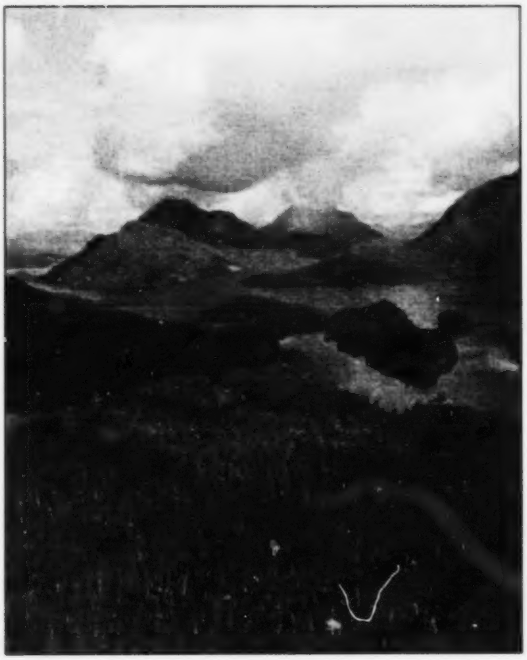
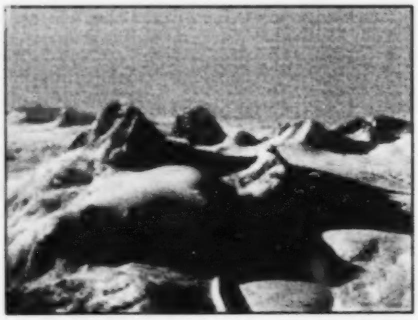
Tourism Opportunity Strategy
for the
Mid Coast Forest District of British Columbia

FINAL REPORT – JULY 2001





Prepared for:
Ministry of Small Business, Tourism & Culture

Prepared by:
Marlyn Chisholm & Associates
Sunderman & Associates
Geoscape Environmental Planners
Catherine Berris Associates
Frank Brown
Patricia McKim

TABLE OF CONTENTS

1 EXECUTIVE SUMMARY 1

2 INTRODUCTION 1
2.1 Background 1
2.2 Purpose 1
2.3 Scope and Methodology 2
2.4 Report Structure 3

3 CONTEXT AND SETTING 4

3.1 Physical Setting 4
3.2 Transportation and Communication Infrastructure 4
3.2.1 Introduction 4
3.2.2 Road Transportation 4
3.2.3 Water Transportation 8
3.2.4 Air Transportation 9
3.2.5 Links to Other Transportation Centres 10
3.2.6 Communication Infrastruction 10
3.3 Community Profiles 10
3.3.1 Communities of the Outer Coast 12
3.3.2 Communities of the Owikeno Lake Area 15
3.3.3 Communities of the Fiords and Lakes Area 15
3.3.4 Communities of the Mountains and Trade Routes Region 16
3.4 Economic and Planning Context 19

4 THE TOURISM INDUSTRY 24

4.1 Introduction 24
4.2 Global and North American Tourism 24
4.2.1 Global Tourism Demand 24
4.2.2 Tourism in British Columbia 26
4.3 Tourism in the Cariboo Region 27
4.4 Tourism in the Mid Coast Forest District 28
4.4.1 Tourism Profile 28
4.5 Trends in Tourism and Recreation 31
4.5.1 Social and Demographic Trends 31
4.5.2 Global Economic Growth 34
4.5.3 Technology and Internet 34
4.5.4 Competition 35
4.6 What Does This Mean for Tourism on the Mid Coast? 35

5 RESOURCES OF THE MID COAST 37

5.1 Study Area and Features 37
5.2 Resource Area Description 37
5.3 Product Selection 41
5.4 Community and Product Matching 43
5.5 Suitability Map Description 46

6 PRODUCT ASSESSMENT 48

6.1 Introduction 48
6.2 Culture Heritage 48
  6.2.1 Resource Assessment 50
  6.2.2 Market, Economic and Social Assessment 54
6.3 Ocean Kayaking 57
  6.3.1 Resource Assessment 57
  6.3.2 Market, Economic and Social Assessment 59
6.4 Nature Observation 69
  6.4.1 Resource Assessment 69
  6.4.2 Market, Economic and Social Assessment 76
6.5 Marine Cruising 83
  6.5.1 Resource Assessment 83
  6.5.2 Market, Economic and Social Assessment 87
6.6 Road Tour 96
  6.6.1 Resource Assessment 96
  6.6.2 Market, Economic and Social Assessment 98
6.7 Destination Lodge 105
  6.7.1 Resource Assessment 105
  6.7.2 Market, Economic and Social Assessment 107
6.8 Hut to Hut System 116
  6.8.1 Resource Assessment 116
  6.8.2 Market, Economic and Social Assessment 120
6.9 Adventure 131
  6.9.1 Resource Assessment 131
  6.9.2 Market, Economic and Social Assessment 133
6.10 Air Tour 145
  6.10.1 Resource Assessment 145
  6.10.2 Market, Economic and Social Assessment 147

7 ISSUES AND ACTION PLAN 155

7.1 Introduction 155
7.2 Issues Overview 156
  7.2.1 Issues Scan 156
7.3 Product Action Plan 159
  7.3.1 Outer Coast 160
  7.3.2 Inner Coast 165
7.4 Regional Strategy 170

8 **PREFEASIBILITY ASSESSMENTS** 177

8.1 Introduction 177
8.2 Prefeasibility Assessment of a Marine Cruise and Canopy Walk at Roscoe Inlet 178
8.3 Prefeasibility Assessment of a Road Tour in the Bella Coola Valley 188
8.4 Prefeasibility Assessment of a Hut to Hut Ocean Kayaking Tour 196

APPENDICES

APPENDIX A LIST OF CONTACTS AND COMMITTEE MEMBERS
APPENDIX B BIBLIOGRAPHY
APPENDIX C RESOURCES: GOVERNMENT CONTACTS AND WEB SITES

LIST OF MAPS

OCEAN KAYAKING SUITABILITY 68
NATURE OBSERVATION SUITABILITY 82
MARINE CRUISE SUITABILITY 95
ROAD TOUR SUITABILITY 104
DESTINATION LODGE SUITABILITY 115
HUT SYSTEM SUITABILITY 130
ADVENTURE SUITABILITY 143
AIR TOUR SUITABILITY 154

1 EXECUTIVE SUMMARY

Introduction

Marlyn Chisholm & Associates has been commissioned by the Ministry of Small Business, Tourism and Culture to identify opportunities for sustainable community-based tourism development in the Mid Coast Forest District. The sub-consultants on this project are Geoscape Environmental Planners, Catherine Berris Associates, Sunderman and Associates, Frank Brown of Bella Bella and Patricia McKim of Bella Coola.

The Mid Coast Tourism Opportunity Strategy is one of several carried out in BC during the past two years. As part of the provincial government's Green Economy initiative, the Ministry of Small Business, Tourism and Culture (MSBTC) is undertaking Tourism Opportunity Strategies to assist rural communities, First Nations and entrepreneurs to identify new tourism development opportunities. The focus of the Tourism Opportunity Strategies is ecotourism, adventure travel, and heritage and culturally-based tourism development.

Purpose

The findings of this report should provide a tool for government to support the efforts of individuals, municipal and regional governments, First Nations, tourism operators and economic development commissions to:

- diversify local economies,
- maintain access to recreational resources for local residents, and
- minimize conflicts among resource users.

In addition to identifying key opportunities for tourism, this report provides a strategy for tourism development on the Mid Coast, documents the principle issues and constraints facing Mid Coast tourism, and carries out prefeasibility assessments of three selected tourism opportunities.

Context and Setting

The Mid Coast Forest District is located within the Vancouver Forest Region on the central coast of British Columbia. The Mid Coast is regarded as one of the most remote regions of British Columbia. While the Mid Coast region has one road link (Highway 20) to other parts of the province, and is served by both air and ferry transportation, the ferry service is curtailed during winter months, and poor weather during the winter often makes the Mid Coast difficult to reach by air.

The Mid Coast is sparsely populated, with a population of approximately 4,500 in 1999. Over half of this population is First Nations. The key communities of the Mid Coast are:

- Bella Coola Valley (Bella Coola, Hagensborg, Firvale and Stuie)
- Nuxalk
- Klemtu
- Waglisla (Bella Bella)
- Shearwater/Denny Island
- Ocean Falls
- Oweekeno

The BC Ferry service plays a critical role in accessing the Mid Coast, particularly during the summer months. During the winter months of fiscal year 2000/2001, just over 2,858 passengers travelled from Port Hardy to the Mid Coast, and 765 from Prince Rupert (Route 10). During the summer months of June, July, August and September, the Discovery Passage service (Route 40) transported 3,492 passengers to the Mid Coast from Port Hardy on Route 40 and 4,019 passengers from the Mid Coast to Port Hardy.

By bringing visitors to the Mid Coast regularly throughout the summer months, the Discovery Passage service has made a significant contribution to the regional economy, particularly in Bella Coola, the northern terminus of the route and the gateway to Highway 20.

The Tourism Industry

The Mid Coast has the attributes and appeal to draw domestic and international visitors seeking authentic wilderness, adventure and cultural experiences. The demand exists for what the Mid Coast has to offer and more travellers are being attracted to British Columbia every year. In terms of attracting international markets, the Mid Coast can tap into the unique strengths that it shares with the rest of BC, including:

- a reputation for abundant and pristine wilderness resources,
- an image as an uncrowded and unspoiled holiday destination, and,
- a wide diversity of wildlife.

The challenge is to draw visitors off the beaten path to some of British Columbia's most spectacular, and lesser known, wilderness and scenery.

In the long term, as carrying capacity is approached at other tourism destinations elsewhere in BC and the world, the Mid Coast will increasingly be valued, and sought out, for its pristine qualities. Ecotourism and experiences emphasizing aboriginal culture hold particular promise for the Mid Coast.

Resources of the Mid Coast

The highly varied resources, and the dichotomous nature of the inner and outer Mid Coast regions, presented a unique challenge in both analysis and stakeholder consultation. In order to fully address the resources of the Mid Coast, two separate Advisory Committees were struck. The committee in Bella Bella represented the resources and interests of the outer Mid Coast, and the committee in Bella Coola focused on resources and matters related to the inner Mid Coast.

Each Advisory Committee selected a list of recreation and tourism activities that were highly suitable to its region. The activities were then analyzed respectively and grouped or singled out as specific **tourism products**. These are:

- Culture Heritage
- Ocean Kayaking
- Nature Observation
- Marine Cruising
- Road Touring
- Destination Lodges
- Hut to Hut Systems
- Adventure
- Air Tours

These final products can be regarded as the best short-term options for outdoor recreation-based tourism products. Opportunities to build on clusters of tourism products or where products could be linked are extremely important and are described in this report.

Each of the selected tourism products was further evaluated to determine the land's suitability to support the product. The results of this analysis were documented and depicted in the **suitability maps**. Suitability maps illustrate existing or potential tourism opportunities taking into consideration a range of constraints.

Throughout this report, identified opportunities are associated with the community or communities best situated to benefit from their development.

Product Assessment

As a framework for depicting and mapping the inherent opportunities of the Mid Coast, the landscape has been divided into six geographic units: the **Outer Coast**, **Fiords and Lakes, Channels, Owikeno Lake, Mountains and Trade Routes**, and **Princess Royal Island**.

In the product assessment, each of the tourism products were evaluated using resource criteria in order to identify the geographic units exhibiting the highest potential. Each geographic unit was then assessed by market, economic and social criteria. In so doing, we identified the specific areas, or *polygons*, which exhibit the greatest potential within each geographic unit. This approach was used for all products but Culture/Heritage, where features and opportunities were not specifically identified.

Suitability maps were also generated for each product, except Culture/Heritage. Areas of low, medium and high suitability for recreation were depicted on each map. The following briefly describes the key findings for each product.

Culture/Heritage

The Mid Coast is rich in cultural resources associated with First Nations and non-aboriginal peoples. There is considerable potential to develop tourism products based on these resources. Heritage and cultural tourism products are often closely linked to ecotourism. Development of heritage and cultural tourism products will require considerable sensitivity to local concern. Some heritage and cultural sites are considered to be archaeological sites under the Heritage Conservation Act. These sites cannot be disturbed or altered without permission.

"Ethnotourism" is booming worldwide, with more and more tourists seeking out cultural experiences in Africa, Australia, Asia-Pacific and North America. A recent study of the European long-haul pleasure market shows that Germany, the UK and Italy have the largest potential for aboriginal cultural products

Regional SWOT Summary for Heritage/Culture

Strengths	Quality of cultural resources, very high marketability, existing capacity for further cultural interpretation, low impact, non-consumptive activity.
Weaknesses	Although each culture is unique there is a repeatability of similar products along the BC coast, lack of artifacts and other visible evidence of culture and heritage to outsiders, level of support facilities and services; competition from elsewhere in the province
Opportunities	Education and interpretive tours, linkages to other products, infrastructure development.
Threats	Conflicting land uses

Ocean Kayaking

Ocean kayaking is a fast-growing sport worldwide, and the number of kayakers drawn to the Mid Coast is rising. Most of these are presently served by rental and guiding outfits based on North Vancouver Island.

The highest potential opportunities for ocean kayaking products are in the Outer Coast, Fiords & Lakes and Princess Royal Island geographic areas.

Regional SWOT Analysis for Ocean Kayaking

Strength	Remoteness, scenery, high value features, access, heritage and cultural features, historic and current First Nations presence, growing demand, community support, low startup capital requirements
Weakness	Repeatability of feature along coast, high precipitation, rapidly changing weather and sea conditions, extreme tides, limited camping and freshwater, relatively short "season", insects, Commercial Recreation Tenure uncertainties, uncertainty of land claims and traditional use sites, evidence of historic resource degradation, poor presentation of culture and related features, cost to access region, transportation scheduling
Opportunity	Links with a mothership, hut-to-hut, circuit routes, shuttling, educational, interpretive, overland (hiking, freshwater linkages to marine, leeward to windward side), resort and joint ventures with First Nations.
Threats	Increased use affecting "remote" experience, forest harvesting (visual), user safety preparedness, human waste management, conflicting site uses, competition for limited campsite options, user impact on sites.

Nature Observation

The Mid Coast offers tremendous opportunities in this product area. The Mid Coast has moderate value for Grizzly bear viewing and Princess Royal Island is renowned for the Kermode bear. Other faunas are abundant and can be sighted along rivers and adjacent mountains -- these include mountain goats, black bear, eagles, and migrating birds. The rivers are traditionally well known for salmon and steelhead that are ideal for fishing and for viewing during spawning.

All the geographic units of the Mid Coast have areas with high potential opportunities in nature observation.

Regional SWOT Analysis for Nature Observation

Strength	Quality and quantity of natural and wildlife features, very high marketability for both marine-based (Orcas, whales) and land-based (Kermode bear, grizzlies) species as well as the extensive intact coastal rain forest (old growth and the possibility of unique trees). Proximity to communities. Growing global awareness of Great Bear Rain Forest.
Weakness	Operator attention to resource management issues. Level of support facilities and services available (in terms of washrooms, buildings, parking areas, etc.). Insects. Unreliability of wildlife sightings. Cost to access region. Cost of fuel for boats involved in wildlife observation.
Opportunity	Infrastructure development (e.g. trails and viewing platforms), interpretive touring, touring products linking wildlife, natural features and built facilities (e.g. lighthouses). Linkage to high opportunity activity such as ocean kayaking or boating.
Threats	Unknown tourism impacts on wildlife behaviour & reproductive capacity (e.g., whales and birds). Poor harvesting practices and design can affect scenery and reduce the numbers of large trees. Where bear viewing is frequented, the potential for habituation of bears to tourists is a concern to the safety of both. Direct impacts on wildlife behavior.

Marine Cruising

The Mid-Coast is extensive and offers the scenic quality, the unique geographic features, the possibility for observing wildlife and the opportunity for cultural/heritage interpretation necessary for a successful Marine cruise product. Communities such as Bella Bella, Ocean Falls, Shearwater, Dawsons Landing and Bella Coola offer the required amenities and provide access to optimal areas.

By virtue of distance and features, there appear to be more opportunities for marine cruise development on the outer coast. There are some nearby attractions, however, such as the Tallio Cannery or the Tallio hotsprings that could be destinations for a day trip from Bella Coola.

Regional SWOT Analysis for Marine Cruising

Strength	Sportfishing, range of remoteness, scenery, high value features including wildlife and natural features, culture, presence of lodges, lighthouses, remote communities and tourism infrastructure.
Weakness	High precipitation. Inner coast - great distances between outstanding features and communities. Lack of organized tourism related activities in a number of communities (e.g. cultural interpretation shows) and lack of infrastructure including availability of holding tank pump-out stations, high costs to develop infrastructure. Insects during some parts of the year. High tidal variances are a hazard for cruisers lacking local knowledge. There are no areas that provide assured whale, orca or bear sightings.
Opportunity	Development infrastructures, support products to pocket cruises, cultural and historical exposition. Linkages to on-shore commercial businesses, including tours/ interpretation.
Threats	Forest harvesting (with visual and environmental concerns), land use uncertainties, lack of community support, liquid and garbage waste disposal, contamination of anchorage sites and shellfish beds/aquaculture.

Road Touring

The most promising Road Tour product is along Highway 20, and up The Hill. This includes views of the high peaks that flank the valley, the Bella Coola River, the changing biogeoclimatic zones and the opportunity to see wildlife including grizzly bear. The product could also be linked to culture interpretation of the rich First Nations and immigrant histories. High quality cultural/historical features include the petroglyphs close to Bella Coola and the town of Bella Coola.

Regional SWOT Analysis for Road Touring

Strength	Destination feature (including the "Hill"), linkage to BC Ferries and the Chilcotin, infrastructure and community support, growing demand. Logging roads that lead to tourism features.
Weakness	Limited roads, road deactivation (Forest Service roads and Forest Company licensed roads), road, trail and site maintenance, lack of designated areas, safety concerns on active logging roads and the "Hill", scheduling with BC Ferries. Lack of roadside attractions and interpretive documentation.
Opportunity	Circle tour opportunities (local and regional), linkages with other tour types (marine and air), nature and cultural interpretive tours, linkages with other activities (hiking, air tour)
Threats	Conflict with sensitive wildlife habitats, high operating costs, competition.

Destination Lodge

There are several opportunities on the Mid Coast for developing new lodges linked to various hotsprings, First Nations culture, historic canneries, or a combination thereof. In addition, there are opportunities to enhance existing lodges through diversified activities (kayaking, air tours, wildlife viewing, hiking, nature interpretation, canopy walks, etc.), offering full service spas in a remote "natural" setting, and providing lodge to lodge tours by boat or plane.

With full community participation, the development and operation of a new destination lodge could generate seasonal employment and economic benefits in any of the communities of the Mid Coast.

Regional SWOT Analysis for Destination Lodges

Strengths	Sports fish, remoteness, scenery, high value features including hotsprings. Wildlife (bears and whales). First Nation culture
Weaknesses	High precipitation, poor scheduling of flights and cost to access region, competition among existing sport-fishing lodges, numerous sport fishing lodges in one location (Rivers Inlet), high start up and operating costs, government regulatory obstacles. Little or no relationship with local communities (with a few exceptions).
Opportunity	Diversification into other types of activities such as whale and wildlife watching, freshwater fishing, hiking, exploring, etc.; linkages to air and marine tours; soft adventure market niche seeking world class wilderness experience.
Threats	Land use uncertainties, increased use affecting "remote" experience, forest harvesting (with visual and environmental concerns), decline of the Pacific salmon stock.

Hut to Hut Systems

The topography and climate of the Mid Coast is well suited for this product. The outer coast includes large and small islands, beaches, coves, bays, and lagoons. There are also a number of lakes and rivers throughout the Forest District, and accessible sub-alpine/alpine areas close to Bella Coola. The marine hut system is especially promising on the outer coast.

The hut system can be linked to the culture and heritage of the region. Abandoned canneries, settlements, timber harvest sites, and traditional use sites are educational and interpretive opportunities that can only enhance the hut system product. This product is particularly promising for First Nations communities that want to control the recreational use of their territiorial lands and cultural sites, and that have some infrastructure in place already.

Regional SWOT Analysis for Hut Systems

Strength	Remoteness, scenery, high value recreation features, optimum topography, places recreationists away from culturally or environmentally sensitive locations, enhances recreation opportunities in an area, adjacency to communities, community support for locally-based initiatives, new training opportunities for local labour force
Weakness	Vandalism, repeatability of product potential along BC coast, lack of support infrastructures (trails), cost to access region, compliance and enforcement, challenges in obtaining financing, untested high-end product
Opportunity	Rustic to high end lake and marine hut systems. Linkage to high opportunity activity such as ocean kayaking or boating
Threats	Increased recreation use affecting "remote" experience, forest harvesting

Adventure

The Adventure Product appeals to enthusiastic recreationists seeking an adrenaline experience. The activities identified include windsurfing in high winds, whitewater kayaking, exposed ocean kayaking, ski mountaineering, mountaineering, rock climbing, caving/canyoning, downhill mountain biking and paragliding. With the exception of climbing, these extreme activities are relatively untested on the Mid Coast.

The Adventure Product is seen as a complement to other products on the Mid Coast, and an effective way of raising the Mid Coast's profile as an "extreme" destination. Adventure activities attract a diverse and interesting market, generally younger and with disposable income – and willing to travel a considerable distance to participate in their sport of choice. If a small number of adventure tour operators in inter-related businesses were to become established in a Mid Coast community, they could jointly draw a new and unique market to the region. A cluster of adventure product businesses in any community would generate income in the tourism sector, and for ancillary businesses in the community.

Opportunities for Adventure products are concentrated in the Outer Coast and Mountains and Trade Routes geographic units.

Regional SWOT Analysis for Adventure

Strength	Challenging recreation features close to staging areas suitable for a range of adventure activities. Attractiveness to a growing market. Fosters image of community as an extreme destination.
Weakness	High precipitation and inclement weather. Remoteness from population centers and cost to get to the staging areas. Lack of supportive infrastructure. Limited rescue capability. Access for some of the activities.
Opportunity	Development infrastructures and support products to the range of activities. Support includes sales, rentals, teaching, guiding, shuttling and information support.
Threats	Lack of community support.

Air Tour

The Mid Coast has geographical features well suited for the air tour product. Certain staging areas (communities, base camp or airfield) are closer to the coastal geography, while others are better associated with the high country. To best determine the relationship of the features to the staging area, a 60 km[1] radius was drawn on the map around several chosen staging areas. Staging areas (communities, base camps or airfield) are determined by distance to attractions (a 120 km distance assumed to be the maximum), their ability to attract tourists, their close linkage to industrial opportunities and availability of required infrastructure. Air tours from all the coastal staging areas can access a wide range of coastal features, mountains, lakes and rivers, and there are potential linkages with fishing, nature observation, biking and hiking. Air tours out of Bella Coola/Hagensborg can access the Monarch Glacier, and a wide range of mountainous terrain, and inlets. Tours from this latter staging area could be linked with hiking, mountain biking, canoeing, possible paragliding. There are also tremendous opportunities for heli-skiing in the coastal mountain range.

The highest opportunities exist for air tours based in Bella Bella, Shearwater, Ocean Falls, Bella Coola, and Klemtu.

---

[1] The assumption is that a one hour flight would travel no more than 120 km.

Regional SWOT Analysis for Air Tour

Strength	Scenic recreation features suitable for air tour. Suitable activity opportunities close to staging areas.
Weakness	High precipitation and inclement weather. Remoteness from population centers and cost to get to the staging areas. Lack of supportive infrastructure. Wildlife are incidental and air touring may disturb those in visible areas. Environmental concerns with activities utilizing air access to subalpine/alpine ridges.
Opportunity	Expanding on existing opportunities (such as freshwater fishing), complimenting the road and marine tour products, growth of heli-skiing industry in BC
Threats	Land use uncertainties, lack of community support, declining industrial base.

Tourism Action Plan

A scan of the issues related to tourism development on the Mid Coast shows the following.

- The communities recognize the importance of tourism as an economic generator, but the industry is still in its inception.

- Community support and participation will be critical in the development of future tourism products, particularly those that impact on First Nations territorial lands or traditional use sites.

- In the remote communities of the Mid Coast, there is generally a lack of knowledge regarding how to access resources, information or funding for tourism development, and a scarcity of local mentors who have developed successful business ventures. First Nations communities need to build capacity locally in order to capitalize on and participate in new tourism activities.

- Tourism operators and communities need to work together to advance their collective interests in building tourism on the Mid Coast.

The Tourism Action Plan of Section 7 outlines action strategies for each of the products, and at a general regional level. The **product action strategies** are developed for the outer Mid Coast and the inner Mid Coast respectively, and make specific recommendations regarding product development.

The **regional strategy** makes the following key recommendations for entrepreneurs, communities or economic development proponents.

- Communities should explore ways to **collaborate and connect their resources** to share in product development, forge relationships with communities and operators outside the region, and cultivate solid working relationships will all levels of government to create a climate that will attract investment and foster the timely development of tourism products.

- Support the development of local tourism sector opportunities by establishing a group of **business mentors and regional financial experts** to advise on the issues and requirements of securing financing and business development.

- Work with government or economic development to ensure **up-to-date and accessible tourism information** is in place to support local tourism business development.

- Work towards identifying and developing a **code of ethics** to ensure that tourism operators on the Mid Coast begin to develop high standards, and to promote the region as a provincial leader in this area.

- Establish a task force to explore the opportunities and disadvantages for local operators to develop **joint ventures and partnerships** with larger tourism companies from outside the region

- Identify and deliver specific **training** support.

- Focus on **regional marketing and explore the development of a regional image** by undertaking group marketing of the unique features of the Mid Coast. Tourism proponents can create an image that will raise the profile of the region to compete with other global destinations that feature wilderness and outdoor experiences. Recent media coverage of the Great Bear Rainforest has already been instrumental in raising global awareness of the intrinsic value of the Mid Coast. This could prove to be a good jumping off point for future regional marketing efforts.

- Explore approaches to **coordinating and developing additional resources for marketing** efforts, and use the media and internet as much as possible to publicize events and features of the Mid Coast.

- Establish a visible **tourism information centre** in Bella Coola, the hub of ferry and vehicle traffic during the summer months.. If arriving visitors can obtain information from an attractive and well-marked visitor information centre, many will be inclined to explore the region more, and *stay longer.*

Prefeasibility Assessments

Three opportunities identified by local communities were selected for a more detailed prefeasibility assessment, and the results are summarized below.

Marine Cruise and Canopy Walk at Roscoe Inlet

There are abundant wildlife viewing opportunities in remote Roscoe Inlet – including eagles, bears and wolves, and seasonal chum and pink salmon migrations. Its outstanding viewscape and inherent qualities would make Roscoe Inlet a highly attractive destination for tourists and recreationists seeking a unique wilderness experience. The prime target markets are BC residents and international travellers willing to pay a premium to travel to the Mid Coast.

The appeal of the canopy walk product is enhanced by combining it with other activities – wildlife viewing at Claje Creek and aboriginal cultural interpretation at an ancient Heiltsuk village site. In addition, it could be linked to other types of tours in the region, such as pocket cruises. Variations may include overnight stays at the cabin at Troup Passage or -- in the longer term -- overnight stays in the canopy in converted teahouse. Tours offered during the fall salmon migration would extend operations into the shoulder season.

The canopy walk product has the potential to create positive net revenues for the local community over a long period of time. As it will be a community-owned and operated venture, almost all income will be realized at the local level. Overall, the product would generate employment in construction, operating, guiding, maintenance and marketing throughout almost half of the year. It is entirely compatible with First Nation values, and community objectives of economic self-reliance.

The findings of this analysis appear to confirm that a marine cruise and canopy walk tour at Roscoe Inlet would generate modest but positive net revenues during the early years of operation. Given the nature of the product, it is also clearly sustainable over a long period of time. As demand grows and visits to the Mid Coast increase, the Roscoe Inlet canopy walk tour will make a significant contribution to local economic self-sufficiency. We recommend that long term cash flow be evaluated in the next stage – feasibility assessment and business plan -- as a prelude to seeking funding for the project.

Road Tour of the Bella Coola Valley

A road tour product, in and of itself, is likely to be modestly profitable. However, a well-run road tour could also generate broader economic benefits in a number of ways.

- By informing and entertaining visitors to the Bella Coola Valley, a road tour product would educate a broad audience about the history and attractions of the area, and stimulate greater interest in BC and abroad. The Bella Coola Valley is a "well kept secret" that needs to be told to the world.
- It could be marketed to provide links with other tourism products such as air tours, river drifts, marine tours, short hikes or First Nation culture, thereby spinning off benefits to other operators and to the regional economy.
- In the longer term, it could stimulate demand for more road and marine tours, and other activities.

While further work is required to evaluate the viability of a road tour product in the Bella Coola Valley, the results show that in the first years, modest profitability can be expected. In the longer term, as the operations expand and certain economies of scale are achieved, profitability would likely improve. A road tour represents a very good tourism opportunity in Bella Coola and we recommend that, if someone chooses to undertake this initiative, they carry out a more detailed feasibility assessment and business plan in order to achieve funding.

Hut to Hut Ocean Kayaking Tour Around Bella Bella

The hut-to-hut marine-touring product has the potential to create positive net revenues for the local community of Waglisa for a long period of time. While the actual hut system would generate a small amount of revenue, it will be an important component in diversifying the local adventure tourism products in the community could eventually offer. Through local development of the venture, almost all income generated will be realized in the community. Currently the Heiltsuk have a network of huts in place in the Bella Bella area and the hut infrastructure would not be a barrier. These huts are strategically placed so that a comfortable kayaking experience could be developed between huts. Overall, the product would generate employment in guiding, maintenance and marketing for approximately four or five months of the year. It could be developed in a manner that would be compatible with the Heiltsuk values, and community objectives of economic self-reliance.

The results of the preliminary investigation of the hut-to-hut ocean kayaking touring activity around Bella Bella suggest that there is merit in further exploring the Heiltsuk hut-to-hut ocean kayaking venture. However, the venture will need to undergo several key steps – including a process of community consultation-- to determine if community is supportive of this venture and if the venture is viable.

2 INTRODUCTION

2.1 Background

Marlyn Chisholm & Associates in association with Geoscape Environmental Planners, Catherine Berris Associates and Sunderman and Associates, has been commissioned by the Ministry of Small Business, Tourism and Culture to identify opportunities for sustainable community-based tourism development in the Mid Coast Forest District. The Mid Coast Tourism Opportunity Strategy is intended to do the following:

- provide a regional evaluation of the Mid Coast's most promising tourism products;
- map the tourism products;
- identify the linkages between the communities of the Mid Coast and the opportunities;
- develop a tourism action strategy and make recommendations for future implementation; and,
- carry out pre-feasibility assessments of selected opportunities to evaluate their potential from a business perspective, and to provide a template for other, similar evaluations.

The Mid Coast Tourism Opportunity Strategy is one of several being carried out in BC. Many BC communities have identified tourism as a key sector to focus on for future economic growth and diversification. As part of the provincial government's Green Economy initiative, the Ministry of Small Business, Tourism and Culture (MSBTC) conducts Tourism Opportunity Strategies to assist rural communities, First Nations and entrepreneurs to identify new tourism development opportunities. The focus of the Tourism Opportunity Strategies is ecotourism, adventure travel, and heritage and culturally-based tourism development.

2.2 Purpose

The findings of this report are intended for a wide readership, ranging from government agencies to entrepreneurs and investors. They should provide a tool for government to support the efforts of individuals, municipal and regional governments, First Nations, tourism operators and economic development commissions to:

- diversify local economies,
- maintain access to recreational resources for local residents, and
- minimize conflicts among resource users.

This study should contribute to integrated resource and community planning targeted towards economic, social and environmental sustainability. In addition to identifying key opportunities for tourism, this report provides a strategy for tourism development on the Mid Coast and documents the principle issues and constraints facing tourism today.

The analysis is not meant to be either exclusive or exhaustive. Its objective is to identify and evaluate the product groups that appear to be most promising, and to present a framework for assessing their feasibility at a general level.

The ultimate value of this project is in identifying key opportunities and actions required to assist in the priority-setting of key players in tourism planning, and providing further direction to communities, business people and organizations involved in tourism development on the Mid Coast.

2.3 Scope and Methodology

The key tasks in carrying out this assignment are described as follows.

1. Profile the region and the communities of the Mid Coast to provide a context for the product development. This profile includes a description of the physical setting, transportation and communication infrastructure, the tourism infrastructure of the communities of the Mid Coast, and any relevant planning initiatives underway.

2. Evaluate trends in the tourism industry at the North American/global level, in BC and on the Mid Coast.

3. Select the most promising tourism development products, based on preliminary resource assessment and consultation with Advisory Committee.

4. Assess and map each product with a framework that includes resource, market, economic and social criteria.

5. Match communities with products.

6. Formulate tourism action strategy, and make recommendations for implementation.

7. Carry out brief pre-feasibility assessments of a select number of opportunities. This provides a first cut at assessing some of the more interesting or promising products, and a framework for future assessments on other products.

Community consultation was an integral component of this tourism opportunity strategy. A two-part Advisory Committee was struck early in the project to provide the consultants with input and direction and feedback. We also drew much of our information from local experts, including local tourism operators, community representatives, First Nations, government agencies.

The work plan for this project involved the following key steps that were undertaken concurrently:

- Initiation Meeting in Vancouver with Ministry of Small Business, Tourism and Culture.

- Form Advisory Committee – to properly represent all interests, the Committee has two components – Bella Bella (outer Mid Coast) and Bella Coola (inner Mid Coast) (refer to Appendix A for contact list).
- Initial Meeting with Advisory Committee October 2000.
- Telephone Interviews with tourism operators outside of the study area for information on key success factors and best practices in product development.
- Review Literature of related tourism and land use planning reports, studies and initiatives (refer to Appendix B for sources).
- Carry out product assessment, and feasibility analyses, and document results in draft report.
- Submission of draft to Advisory Committee, and meeting #2 with Advisory Committee February 2001.
- Revisions to draft, and completion in April 2001.
-

2.4 Report Structure

The remainder of this report is summarized as follows.

- **Chapter 3** provides a regional context for this study.
- **Chapter 4** identifies important trends in the tourism industry – worldwide and in BC.
- **Chapter 5** describes the resources and key tourism features of the Mid Coast, explains geographic units, and describes methodology and community/product matching.
- **Chapter 6** provides product assessments and maps for the key identified tourism products.
- **Chapter 7** outlines a tourism action strategy.
- **Chapter 8** provides pre-feasibility assessments for three specific products.

Appendices are as follows:

- A contact list, and list of Steering Committee members, are found in **Appendix A**.
- **Appendix B** is our bibliography.
- Finally, **Appendix C** provides some useful resources for researching and starting up locally based businesses. These are not intended to be exhaustive, but provide a good starting point.

3 CONTEXT AND SETTING

3.1 Physical Setting

The Mid Coast Forest District is located within the Vancouver Forest Region on the central west coast of British Columbia. Located just north of Vancouver Island, this Forest District stretches from Cape Caution in the south to Sheep Passage in the north. It covers approximately 3.2 million hectares, or about three-quarters the size of Vancouver Island. The Mid Coast Forest District encompasses the Mid Coast Timber Supply Area, portions of Western Forest Product's TFL 25, portions of Weyerhaeuser's TFL 39, and nine provincial parks and recreation areas.

The terrain of the Mid Coast Forest District (hereinafter referred to as the Mid Coast) is varied and rugged. The outer coast portion of the Mid Coast is characterized by numerous low-lying islands while further inland the terrain becomes very mountainous with inlets with steep slopes that rise quickly from the water. There are four biogeoclimatic zones on the Mid Coast Forest District including the Coastal Western Hemlock zone which occurs at the low to mid elevations, the Mountain Hemlock zone found predominately at mid to upper elevations, and the Engelmann Spruce-Subalpine Fir zone and the Alpine Tundra, both located at higher elevations.

3.2 Transportation and Communication Infrastructure

3.2.1 Introduction

Bella Coola, situated at the head of the North Bentinck Arm of Burke Channel, marks the western terminus of Canada's first land crossing by Alexander Mackenzie in 1793. The Mid Coast is regarded as one of the most remote regions of British Columbia. The Mid Coast has one road link to other parts of the province, and is served by both air and ferry transportation, however the ferry service is curtailed during winter months, and poor weather during the winter often makes the Mid Coast difficult to reach by air. While the Mid Coast has most telecommunication services, they are limited and, in some of the remote communities like Waglisla, internet connections are not always reliable.

3.2.2 Road Transportation

Highway 20 is the only road link between the Mid Coast Forest District and the rest of the province. Highway 20 runs east-west between Bella Coola and Williams Lake, a total of 456 kilometres. In Williams Lake, Highway 20 connects with Highway 97, the key north-south road corridor in BC.

Prior to the early 1950s, there was no road access to the Bella Coola Valley. Pack horse trails provided the only overland route from Bella Coola to the interior of BC. The provincial government refused to construct a road between the Bella Coola Valley and Anahim Lake because of the mountainous terrain and steep grades that would be required. The project was eventually initiated by the citizens of Bella Coola, and the road completed in 1953, with the official opening in 1955. The western component of Highway 20 that rises out of the Bella Coola valley and through the mountains en route to the interior plateau (known as the Hill) is characterized by remarkably steep grades -- as much as 18 percent -- and several switchbacks. This notwithstanding, the Hill route is traveled daily (and nightly) year round by all kinds of motorized vehicles, including semi-trailers, and Highway 20 serves as the key supply line for goods and services to the communities of the Bella Coola Valley and beyond.

Several upgrades are required for Highway 20, especially the Hill component, however it is estimated that the cost of replacing the Bella Coola hill road would be expensive, requiring a significant portion of the provincial government's annual road budget.[1]

The provincial Ministry of Transportation and Highways (MOTH) tracks highway traffic at location counters throughout BC. The counters provide information on Summer Average Daily Traffic, which incorporates both year-round regional and tourist traffic. In the Thompson Okanagan Region[2], there are seven counters located between Bella Coola and Williams Lake. Traffic data from these counters show that between 1995 and 1999 the trend in traffic growth on Highway 20 has been either relatively constant or declining. While there is no 1996 to 1999 data available for the counter near Bella Coola, MoTH indicates that the trend in traffic volumes at Bella Coola is similar to that captured by the counter near Anahim Lake, which shows a slight upward trend.

The SADT/AADT (Summer Average Daily Traffic/Average Annual Daily Traffic) ratios indicates that tourism traffic significantly boosts daily volumes during the summer months at the four westernmost counters -- in fact, the further west the counter, the higher the SADT/AADT ratio. Clearly the higher traffic volumes during the summer months is strongly impacted by ferry traffic arriving at and departing from the Mid Coast.

---

[1] Source: Premier's Summit on Economic Opportunity for the Cariboo-Chilcotin, 2000.

[2] This refers to the MoTH Thompson Okanagan Region, which includes the Bella Coola Valley.

Table 3.2-1: Summer Average Daily Traffics
Highway 20, Williams Lake to Bella Coola

Location of Traffic Counter	Summer Average Daily Traffic on Highway 20 between Bella Coola and Williams Lake					SADT/ AADT (1995-98)
	1995	1996	1997	1998	1999	
West end of Foot Hill Bridge, 78 km east of Bella Coola	189	na	na	na	na[3]	1.97
1.2 km west of Anahim Street, Anahim Lake	282	294	321	309	296	1.51
2.0 km east of Chilanko Loop Road, 175 km west of Williams lake	415	420	na	470	458	1.27
.8 km west of Route 97, Williams Lake	na	na	18,389	17,368	17,906	1.02

Source: Ministry of Highways and Transportation

It is estimated that there are approximately 30,000 traffic movements to and from Bella Coola per year (measured at the traffic counter 78 km east of Bella Coola). A large proportion of total traffic on Highway 20 -- approximately 20 percent -- is truck traffic. During the summer months approximately 5 percent of traffic is comprised of recreational vehicles.[4]

There is no public bus service on Highway 20 between Bella Coola and Williams Lake. While a number of bus tours operate between Vancouver Island and the Mid Coast, there are currently no charter bus tours to the Mid Coast originating in Williams Lake. While two bus tour companies have operated out of Williams Lake in the past, both suspended service due to poor ridership. A staffer at the Visitor Information Centre in Williams Lake indicates that the demand exists for bus tours on this route, but several years of operation and marketing would be required to build the ridership needed to make it a profitable venture.

Visitors arriving by ferry can rent a car in Bella Coola in order to drive Highway 20 to Williams Lake. On average, the drive takes 6 to 7 hours.

The early arrival time for northbound ferries during the summer months (at 6:30 am or 7:30 am four times per week[5]), and the long drive from Bella Coola to Williams Lake, likely act as incentives for many ferry travellers to spend only a short time in Bella Coola, and then to drive on to Williams Lake early in the day. This points to the need for effective marketing of the Mid Coast's attractions both *before* and *upon* the ferry's arrival at Bella Coola in order to increase the number and duration of stayovers.

---

[3] While MoTH may have collected data for some of the years between 1996 to 1999, at the time of writing they have not yet been tabulated.

[4] Source: Ministry of Transportation and Highways

[5] summer schedule for 2001

3.2.3 Water Transportation

Ferry System

BC Ferries serves the communities of the Mid Coast on a year round basis, providing both vehicle and walk-on passenger service. Coast Ferries also provides freight transportation from Vancouver to Klemtu and Bella Bella twice per month.

During the summer months (approximately mid June to mid September), the Queen of Chilliwack ferry travels to and from the Mid Coast on the Discovery Coast Passage (Route 40). The service extends from Port Hardy to Bella Coola, making several stops per week in Namu, Shearwater, Ocean Falls, McLoughlin Bay (near Bella Bella), and Klemtu. Passengers have a choice of shorter, one-day trips between the two home ports, or more extended trips with stopovers at some of the smaller communities. The Queen of Chilliwack has the capacity for 85 cars, and 250 passengers. Although a relatively new service, the Discovery Coast Passage has garnered a reputation as a unique tourism draw.

Ferry service to and from the Mid Coast is significantly reduced between September and May. During these months, the communities of the Mid Coast are served by the Queen of the North as part of the Inland Passage Route 10 between Port Hardy and Prince Rupert. The schedule for the winter of 2000/2001 indicates that the ferry stops at Mid Coast communities approximately twice per month in each direction, while there is no service at all to or from Bella Coola.

Table 3.2-2: BC Ferries' Traffic Volumes on Routes 10 and 40 to the Mid Coast
Fiscal Year 1999/2000

	To Mid Coast destinations Fiscal 99/00		To destinations Other than Mid Coast Fiscal 99/00	
Route 10 (Winter) -- Sept. to May	**Vehicles**	**Passengers**	**Vehicles**	**Passengers**
Departs Bear Cove (Pt. Hardy)	668	2,858	7,742	28,021
Departs Prince Rupert	79	765	7,801	33,579
Departs Mid Coast communities	23	234	524	2,179
Route 40 (Summer) -- June, July, August and Sept[6]				
Departs Bear Cove (Pt. Hardy)	1,063	3,492	0	0
Departs Prince Rupert	16	178	0	0
Departs Mid Coast communities	228	804	1,016	4,019

---

[6] Route 40 generally runs until Mid September.

The foregoing traffic data for fiscal year 1999/2000 shows that, during the winter months, just over 2,858 passengers travelled from Port Hardy to the Mid Coast, and 765 from Prince Rupert. The Mid Coast accounted for approximately ten percent of northbound passengers, and two percent of southbound passengers, on Route 10.

During the summer months of June, July, August and September, 3,492 passengers travelled to the Mid Coast from Port Hardy on Route 40. Over the same period, a slightly larger number of passengers (4,019) travelled from the Mid Coast to Port Hardy. There was also a small volume of passengers travelling between the communities of the Mid Coast.

While the Discovery Passage Route is only four years old, awareness of the service is growing, and passenger volumes have been steady over the past few years.[7] By bringing visitors to the Mid Coast regularly throughout the summer months, the Discovery Passage service has made a significant contribution to the regional economy, particularly in Bella Coola, the northern terminus of the route and the gateway to Highway 20.

BC Ferries indicates that the Queen of Chilliwack is underutilized during the summer months, and that its lack of amenities (such as no cabin accommodation) makes it more appealing to a younger market. Older or retired travellers – a growing component of the tourism market – find it less attractive. BC Ferries is therefore planning to change the service to the Mid Coast by the year 2004 this matter is presently under negotiation. The Queen of Chilliwack will be taken out of northern service entirely and a larger ship (of the same size as the Queen of the North) will provide a modified Mid Coast service. The new vessel would be faster, and have cabins for passengers. The service would be reduced to three or four times per week.

Tourism operators and business owners on the Mid Coast, especially those in Bella Coola, have expressed serious concern about the proposed service changes. Bella Coola presently has enough capacity (hotel rooms, stores and other services) to handle the number of daily arrivals on the Queen of Chilliwack and to provide accommodation. However, the hotels in Bella Coola would not be able to accommodate a significantly higher number of arrivals, and this business would be lost. Moreover, these arrivals would be less frequent. In addition to the foregoing, Bella Coola would become a stop off on the Mid Coast route, losing its status as a destination point.

It is our understanding that BC Ferries is presently revising its plans for the new service, in response to public consultation feedback in the fall of 2000, however these plans are not yet available publicly.

Private or Charter Vessels

While many pleasure and other private craft ply the waters of the Mid Coast, it is extremely difficult to obtain accurate numbers. A majority of these go to Hakai Pass and Fiordland, or the circle route that links Dean Channel (north of King Island), Labouchere Channel and Burke Channel. There are harbour authorities in both Bella Coola and Ocean Falls, however only a small subset tie up at these harbours. On average, 40 to 50 boats tie up at Bella Coola harbour each summer – they are generally at least 40 feet in length. No information is available for the Ocean Falls harbour. The manager of the Shearwater marina indicates that at least 300 boats tie up overnight per season, and that there are many more daytime visitors.

---

[7] It is difficult to make consistent year-to-year comparisons of passenger/vehicle numbers on Route 40 over the past four years because, among other things, the duration of the summer season has varied. For example, Route 40 ran until the end of September in fiscal year 1997/98, but only to the second week of September in the subsequent two years.

Travel between the communities of the Mid Coast are primarily by air or charter boat. Charter boat travel declines during the winter months.

A sea bus travels between Shearwater and Bella Bella every two hours.

Port Facilities

The communities of the Mid Coast have the following port or wharf infrastructure.

- There is no public dock on **Denny Island** (where Shearwater is located), but water access is available via the DFO wharf or Shearwater Marina's float. There is a ferry dock at Atlin Point.
- There is a public Transport Canada Wharf in the centre of **Bella Bella**, and the BC Ferries McLoughlin Bay terminal is located 3 kilometers from the village. A new road has recently been completed to connect the ferry terminal with Bella Bella, at a cost of $1.6 million.
- **Ocean Falls** has a Transport Canada wharf and a roll on-roll off ferry wharf.
- **Klemtu** has a public Transport Canada wharf, and a ro-ro ferry dock.
- **Bella Coola** has a Transport Canada wharf, a public boat launch, a marina, a ro-ro ferry dock and several charter operations.

3.2.4 Air Transportation

Travel to and from the Mid Coast, and between the communities of the Mid Coast, is largely by air, particularly during the winter months. This is because ferry and chartered boat service is generally infrequent or slow, and because of the considerable distances involved. However, air travel on the Mid Coast during the winter months can be delayed due to poor weather conditions.

Bella Coola, Bella Bella, and Denny Island (Shearwater) all have paved landing strips, while Oweekeno' s landing strip is unpaved and used seasonally. The other communities – Klemtu and Ocean Falls – are accessible by float plane only, while Denny Island also has a protected float plan base.

Approximately 30,000 visitors travelled to and from the Mid Coast in 1999/2000. Pacific Coastal Airways is the only scheduled carrier that serves the Mid Coast, flying to both Bella Bella and Bella Coola from Vancouver. There is one scheduled flight per day from the late fall to mid-May, and two flights per day during the summer months. Flights to and from the Mid Coast are generally at high capacity year round. Pacific Coastal's Beaver aircraft also provides five daily flights per week from Bella Bella to Klemtu.

It is our understanding the Bella Coola airport does not tabulate annual passenger volumes or landings, however we are informed that there were 3,512 landings at the Bella Bella airport in 1990/2000, approximately the same as the year before.

Klemtu, Oweekeno and Ocean Falls are all accessible by charter flights. Pacific Coastal provides charters, and there are two other small chartered airplane operations based within the region -- Bella Coola Air, and Sharp Wings which charters between Williams Lake and the Mid Coast. In addition, there are also two helicopter charter companies with operations in Bella Coola – Vancouver Island Helicopters, and West Coast Helicopters. In addition to regional operators, there are a number of charter companies that fly from Vancouver to the Mid Coast, including North Vancouver Air. Charter plane and helicopter operations provide their services in general transportation, recreation and industrial sectors – for example, transporting passengers to fishing camps and logging camps.

In January 2001 Pacific Coastal Airways cancelled the scheduled air service between the communities of Bella Coola and Bella Bella. This has introduced a new complication for those who need to travel between the two major communities of the Mid Coast. It is now necessary to charter planes for this trip.

3.2.5 Links to Other Transportation Centres

Highway 20 links the Bella Coola Valley with BC Rail's passenger service in Williams Lake. During the winter months, travellers can also take the ferry from the Mid Coast to Prince Rupert, which is the terminus for CP Rail's passenger service.

3.2.6 Communication Infrastructure

In most of the communities of the Mid Coast, telephone, electronic medium and other communication services are operational, although not necessarily up to date. With the exception of Oweekeno, which enjoys a private satellite telecommunication service, telephone services offered on the Mid Coast have some limitations. Internet communication with Bella Bella is also unreliable. Bella Bella (and possibly other First Nation communities on the Mid Coast) is investigating the possibility of upgrading their telecommunication system in cooperation with TELUS.

3.3 Community Profiles

For purposes of analysis, the project area has been disaggregated into six units: the **Outer Coast, Fiords and Lakes, Channels, Owikeno Lake, Mountains and Trade Routes**, and **Princess Royal Island**. (This breakdown is based on logical geographical distinctions, to be discussed in section 5.) There are communities situated in most of these geographic units. The objective of this section is to provide a context for evaluating the various tourism products within the various units, and to identify which communities would benefit from tourism development within each of units on the Mid Coast.

The Mid Coast is one of the most remote and sparsely populated regions of the province, with a population of approximately 4,500 in 1999. Over half of this population is First Nations. The key communities of the Mid Coast are:

- Bella Coola Valley (Bella Coola, Hagensborg, Firvale and Stuie)
- Nuxalk
- Klemtu
- Waglisla (Bella Bella)
- Shearwater/Denny Island
- Ocean Falls
- Oweekeno

Duncanby Landing and Dawsons Landing, both near Rivers Inlet, are small service centres for the marine tourism and commercial fisheries industries.

The largest communities in the project area are the Bella Coola Valley and Waglisla, with populations of 2,440 (including the Nuxalk) and 1,250 respectively. Approximately one half of the population on the Mid Coast lives in the Bella Coola Valley, while the remaining population is distributed across the small settlements on the outer coast.

First Nations have inhabited the Mid Coast area in large numbers for several thousands of years. The region has been home to many permanent First Nation communities and numerous seasonal camps. Prior to the mid-1800s, there was extensive trade between communities on the coast and with the Carrier First Nation in the Interior. This led to the establishment of the famous "grease trails" that connected Nuxalk villages, and led to the Interior plateau. In the early 1800s the First Nations of the Mid Coast and European fur traders began to actively interact in commerce. However, by the 1860s, due to conflict and diseases, many of the villages began to disappear and the First Nation populations entered a period of rapid decline. It wasn't until after the 1918 flu epidemics that the First Nation populations began to stabilize, however, only a fraction of the original First Nation population remains.

Today, the First Nations that inhabit and/or have territorial claims on the Mid Coast are:

- Kitasoo/Xai'xai – live in Klemtu,
- Heiltsuk – principle community is Waglisla,
- Nuxalk – main village near Bella Coola,
- Oweekeno – community is at Rivers Inlet, and,
- Gwa'Sala-Nakwaxda'xw – Port Hardy, with territorial claims on Mid Coast.

The remainder of this section profiles each of the key communities of the Mid Coast.

3.3.1 Communities of the Outer Coast

Klemtu

Location – Klemtu is situated on a sheltered harbour safe from inclement weather on the south-east side of Swindle Island. The community is located beside Finalyson Channel slightly north and west of the community of Ocean Falls.

History – Klemtu is the only occupied village in Kitasoo/ Xai'xais territory. The people of Klemtu come from two distinct cultural linguistic groups. The Kitasoo component is of Tsimshian origin related to many Nations from the neighbouring north coast including Prince Rupert, Terrace, Port Simpson and Hartley Bay. The Xais'xais are from the Kwa'kwala language group of the Mid Coast.

Transportation – There is BC Ferries service to this community year round. There is no year-round road access to a service centre resulting in the community experiencing high transportation costs.

Demographics – There are approximately 325 residents living in Klemtu.[8] With just over 30 percent of the community's population being 14 years of age or younger, the community has a significantly higher percentage of young people than is generally observed in the province which averages 20 percent in the same age group. Conversely, fewer than 5 percent of the local population is 65 years or older, which is just over one-third of the provincial average of 13 percent for this age group.

Economy and Labour Force – The fishing industry continues to be a vital part of the local economy. While there has been a decline in recent years within the commercial fishing of wild salmon, a local aquaculture industry is continuing to develop. Fishing and fishing related activities involve approximately 21 percent of the local labour force. In recent years, the Kitasoo people have become more involved in all phases of forest sector activity. Approximately 15 percent of the labour force are now involved in the forest industry. Value-added opportunities in fishing, forestry and other small business areas are being pursued, while government services with health, education, and Band administration is the largest employer in the community and represents 45 percent of the labour force. Transportation, goods and services are also economic generators for this community and make up the remaining employment opportunities.

Tourism Infrastructure – There is a fuel dock, a float, a well-stocked store, café, showers, police, medical services and an excellent source of fresh water. Klemtu generates its own hydroelectric power. Communication systems are up to date with electronic mail service, internet access, telephone and fax links. Tourism is becoming more viable due in part to the Discovery Passage ferry service; however, transportation links remain one of the main barriers to tourism development.

---

[8] First Nations populations based on Indian and Northern Affairs registered populations for October 2000.

Waglisla (Bella Bella)

Location – Waglisla is also known as New Bella Bella. It is located on Campbell Island beside Seaforth Channel.

History – The Heiltsuk people lived in many villages and seasonal camp locations throughout the Heiltsuk territory for several thousands of years. Between 1860 and 1890, and as a result of increased conflict and disease, the people began to concentrate into one village in McLoughlin Bay. In the 1890s the Heiltsuk moved their community to the present site of Bella Bella. Heiltsuk people today can trace their lineage to one of the original five tribal groups.

Demograhics – Bella Bella is the largest settlement on the outer coast and is the home of the Heiltsuk Nation. Bella Bella has a population of approximately 1,250 people. The community is characterized by a younger average age than the provincial average. Bella Bella, with just over 5 percent of its population over 65 years, has less than half the average seniors population (13 percent) of the province as a whole. Conversely, just under 28 percent of the local population is under 14 years of age, while the BC average for this age group is less than 20 percent.[9]

Economy and Labour Force – Government services represent the largest portion of the labour force with approximately 51 percent involved in band administration, health and education services. The resource sector, with employment in commercial fishing, fish processing, salmon hatchery, and forestry activities provide employment for approximately 27 percent of the labour force. Recent partnerships with forest companies have allowed for expansion into siliviculture and logging. Value added fish and forest products are targeted to play a greater role in community economic development in the future. A further 18 percent of the labour force are engaged in retail and whole services, transportation, and construction activities. Approximately 4 percent of the labour force are involved in accommodation, food and beverage services industries. Tourism, home-based and cottage industries, and transportation in goods and services are increasing in importance in the local economy.

Transportation – Campbell Island at McLoughlin Bay is a port of call for BC Ferries' Inside Passage and Discovery Coast services. A paved runway is also on Campbell Island with regular scheduled air service to Vancouver and Vancouver Island.

Key Infrastructure – Bella Bella serves as the main supply and communication centre for the outer Mid Coast. The community has a water treatment plant, docks, fuel, store, banking, RCMP and hospital. Telephone, electronic medium and other communication services are up to date. As well, Bella Bella has a secure supply of hydro electricity from the nearby plant at Ocean Falls.

---

[9] Statistics Canada, 1996 Census.

Denny Island/ Shearwater

Location – Denny Island is situated across from Campbell Island and is a non-native community under the Central Coast Regional District settlement area.

History – The Royal Canadian Air Force chose the Shearwater site on Denny Island as an reconnaissance base during World War II. The base was built to accommodate over 2,000 military personnel; however, there was never more than 1,000 stationed there at any one time.

Demographics – There is a population of approximately 120 residents.

Economy and Labour Force – Employment opportunities are found in tourism, beach combing and hand logging. There are two commercial fish boats and one dive boat. A marine service and fuel station is also located at Shearwater with Shearwater Marine being the main local employer. Fish processing did occur but the plant has been closed for several years. There is some cottage industry and home based business occupations.

Transportation – BC Ferries terminal for Discovery Coast ferry service at Shearwater.

Key Infrastructure – There is a resort and marina with 2,000 feet of docks, a new fuel station, campground, showers, restaurant, hardware store, grocery store, laundromat, pub and a post office in Shearwater. The community receives reliable hydro electric power from nearby Ocean Falls. Communication systems are up to date. There is also a 70-ton travel lift, a 100-ton haul-out, and all marine repairs.

Duncanby Landing

Location – Located near Goose Bay in Rivers Inlet.

Economy – This small community is a family-run service center for marine tourism and the commercial fisheries.

Key Infrastructure – Moorage, gas, diesel, propane, water, 30-amp power, showers, laundry, liquor and groceries are available. There is also a satellite phone.

Dawsons Landing

Location – Located near Rivers Inlet.

Economy – Dawsons Landing is a service center for marine tourism, the commercial fisheries and the nearby residents of the Rivers Inlet area

Key Infrastructure – Here there is a public wharf with a Department of Fisheries and Ocean float. The community also has a post office, a well equipped general store, and a liquor store. Charts, water, ice, gas, diesel and other products are available.

3.3.2 Owikeno Lake Area

Oweekeno

Location – Oweekeno is located in the southern portion of the Mid Coast, at the east end of Rivers Inlet on the banks of the Wannock River at the entrance to Owikeno Lake.

History – Archaeological evidence dates back 9,000 years in the area and the Oweekeno people are thought to have once had the largest population of all Mid Coast nations. More recently, Oweekeno was the center of the region's fisheries with over 14 salmon canneries and a solid commercial fleet. Canneries developed in the area as a result of access to fresh water, proximity to the migratory path of salmon species and a close proximity to the market. The Rivers Inlet / Oweekeno Lake sockeye run was once considered one of the top producers in British Columbia; however, today this system is on the endangered list, and sockeye populations are at a critical low.

Transportation – Oweekeno has no direct road link to neighbouring communities and is accessible only by boat or plane.

Demographics – Oweekeno has a population of just over 100.

Economy and Labour Force – Oweekeno was entirely dependent on the cannery industry for employment and with its collapse the community faced immediate high unemployment. In the past five years, some inroads have been made to increase employment in forestry, watershed restoration, fisheries enhancement and habitat restoration. Access to timber for community development through partnerships with licensees is now occurring.

Key Infrastructure – Oweekeno has a new school, new health and administrative centre, and a sophisticated communication system. There is also a new air landing strip.

3.3.3 Fiords and Lakes Area

Ocean Falls

Location – Ocean Falls is located at the head of Cousins Inlet.

History – It was established as a sawmill and pulp mill town in 1909. At its height, Ocean Falls had a core population of 3,000 people, although much of this was transient. Difficult and distant markets, access to fiber and an aging facility eroded the workforce over the years. In 1968 Crown Zellerbach closed the kraft and sulfite operation of the mill with the loss of 100 jobs. By 1969 discussion to shut down of the mill began and Crown Zellerbach was successful in an application to change timber licenses solely dedicated to Ocean Falls to joint licenses held by Ocean Falls and Elk Falls. In 1973 Ocean Falls was purchased by the provincial government and in 1980 the operation at Ocean Falls closed with the exodus of most of the community's population.

Transportation – There is regularly scheduled float plane service to Ocean Falls as well as the Discovery Coast ferry service to the community.

Demographics – Today there is a core of approximately 50 people living year-round in Ocean Falls. Some residents are original pulp mill workers while the rest are newcomers looking for an alternative life style. In the summer months the population increases to over 150.

Economy and Labour Force – The Ocean Falls Corporation no longer exists and the community is operated under an Improvement District. The power company is privately owned and provides power to Ocean Falls, Denny Island and Bella Bella. Employment is found in beach combing, tourism and with the power company.

Key Infrastructure – There is a superb power supply, access to large volumes of water, excellent deep-sea port, good communication systems, stores, laundromat, post office and a yacht club.

3.3.4 Mountains and Trade Routes Region

Bella Coola Valley

The Bella Coola Valley is 80 km long, extending east-west from the eastern end of North Bentinck Arm to Tweedsmuir Park, where the coastal range begins to ascend towards the Interior Plateau. There are five communities situated within the Bella Coola Valley – the Bella Coola town site, Hagensborg, Firvale, Stuie and Nuxalk. The first four communities are non-native, while the last is the home of the Nuxalk Nation. Bella Coola town site and Nuxalk are in close proximity, and share some infrastructure. We have, however, chosen to profile the non-Native communities and the Nuxalk separately, as follows.

Non-Native Communities (Bella Coola, Hagensborg, Firvale and Stuie)

Location – The non-native communities of the Bella Coola Valley are located along the Bella Coola River – they are Bella Coola, Hagensborg , Firvale and Stuie. All four are unincorporated communities. The Bella Coola townsite is located at the east end of the North Bentick Arm, where the Bella Coola River flows into the channel. Hagensborg is situated east of Bella Coola at the junction of Salloomt River and Bella Coola River and is 19 kilometres east of the mouth of the Bella Coola, and 32 kilometres from the west entrance to Tweedsmuir Provincial Park. The community of Firvale is located just outside Tweedsmuir Provincial Park while Stuie is located just inside Tweedsmuir Park. All communities are located along Highway 20.

History – In 1793, Alexander Mackenzie, traveling over land, visited the Bella Coola Valley on his exploration of an overland route to the Pacific. The Hudson's Bay Company established a post in the area in 1869, but Company clerk John Clayton's house by the river is all that remains.
The largest group of settlers were of Norwegian descent, who where attracted by the homelike settings of the fiords, moved to the valley from their first settlements in Minnesota. The Norwegian settlers arrived in the Bella Coola Valley in 1894 and took up farming, commercial fishing and eventually logging. Lands were allocated under crown grants, which were designed to stimulate regional economic development. Today, many descendants still live in the area and continue to earn a living in resource based activity. The Bella Coola Valley remained relatively isolated until 1953 when the highway was constructed.

Transportation – BC Ferries provides regular summer service to Bella Coola, the terminus of the Discovery Coast Ferry service. The communities of the Bella Coola Valley are all accessible by Highway 20. There is daily scheduled air service from Bella Coola to Anahim Lake and Vancouver.

Demographics – The Bella Coola Valley has a population of approximately 2,440. The population is concentrated in the lower half of the Bella Coola Valley with approximately 605 residents live in Hagensborg area and another 725 living in the lower half of the Bella Coola Valley between Hagensborg and the mouth of the Bella Coola River. The remaining residents live in the upper Bella Coola Valley. The Valley is characterized by an age distribution that is very similar to the provincial average. With 13 percent of the population over 65 years, the Valley mirrors the provincial percentage for seniors and with 20 percent of the local population under 14 years of age the Valley is also close to the BC average for population under 14 years of age.[10] The population in the Valley did not change between 1991 and 1996.

Economy and Labour Force – The total labour force in the Bella Coola Valley (excluding First Nations) is approximately 880 with 185 individuals or 21 percent of the labour force involved in logging and forest services. This makes employment in the logging and forest services sector the largest single component of the local labour market. Several other sectors contribute significantly to the local economy including government services (education, health, and government) with approximately 18 percent of the labour force. A further 12 percent are engaged in retail and whole services, while 10 percent are involved in transportation and construction activities. Manufacturing, agriculture, construction, communications and fishing, each with approximately 5 percent of the labour force also contribute to the overall economic wealth. Approximately 9 percent of the labour force are involved in accommodation, food and beverage services industries. A variety of other activities make up the remainder of the workforce.

Key Infrastructure – The Bella Coola Valley is a well-established service center, with a range of tourism businesses and services located primarily in Bella Coola and Hagensborg. There are a variety of shops and stores in the town of Bella Coola including local native art, restaurants, a clothing store, mechanic service, food store, travel agent, marine supplies, liquor store, credit union, museum, gas station, and several government offices. The community also has several accommodation choices including a hotel, motel, bed & breakfast establishments, a campground, and a restored cannery that takes overnight guests. A significant proportion of Bella Coola's infrastructure is located in the Nuxalk native village.

---

[10] Statistics Canada, 1996 Census.

Hagensborg has one hotel, approximately seven bed and breakfast establishments, and two campgrounds. In the Tweedsmuir Park near Stuie is the famous Tweedsmuir Lodge.[11] There are several guides and tourism activities offered in the valley as well as defined trails and forest service roads.

Nuxalk

Location – The Nuxalk nation is located near the mouth of the Bella Coola River at the east end of North Bentinck Arm of Burke Channel. The main village is located at the Bella Coola River, while the remainder of the population lives in the Four Mile Subdivision located outside of downtown Bella Coola.

History – Previous to the establishment of reserves there were numerous aboriginal settlements or seasonal habitation at Kimsquit, Dean, Skowiltz, Kwatna, Taleomey, Smitley, South and North Bentinck, Sheemahant, Noosgulch, Burnt Bridge and Stuix. The region's larger rivers were rich in oolichan and salmon and the Nuxalk actively traded with the neighbouring interior First Nations following the famous Nuxalk-Carrier grease trail. Spanish fur traders began arriving in the area in the early 1800s. The Americans, who started trading in the area in the 1830s, followed the Spanish. Finally the British from the Hudson Bay Company arrived in the area in the 1860s. In 1862-63 there was a devastating small pox epidemics, which significantly reduced the local populations. In 1902 the remaining Nuxalk villages were consolidated onto two reserves located at the mouth of the Bella Coola River. Here many Nuxalk began to participate in the economic activities of the region's fish canneries.[12] Today canneries no longer dominate local employment opportunities, however, over a third of the Nuxalk labour force is still involved in the resource sectors (ie., fisheries and forestry).

Demograhics – The Nuxulk community is comprised of approximately 900 residents. [13] The community is characterized by a younger average age than the provincial average. The Nuxalk, with only 4.6 percent of its population over 65 years, have only a third of the average senior population (12.8 percent) of the province as a whole. Conversely, over 33.7 percent of the local population is under 14 years of age, compared to the BC average for this age group is less than 20 percent.[14]

Economy and Labour Force – Government services represent the largest portion of the labour force with approximately 35 percent involved in band administration, health and education services. The resource sector, with employment in commercial fishing, fish processing, silviculture, forestry activities, and an ice plant provide employment for approximately 34 percent of the labour force. A further 11 percent of the labour force are engaged in retail and whole services, transportation, and construction activities. Approximately 8 percent of the labour force are involved in accommodation, food and beverage services industries.

Key Infrastructure – The key Nuxalk infrastructure includes the village's water system, government offices and recreation hall. At Four Mile subdivision there is a gas station and three stores which sell a variety of convenience items.

---

[11] Source: www.centralcoastbc.com/accomodation/bellacola.asp

[12] R. Carriere (2000), *Nuxalk First Nations Community Profile.*

[13] First Nations populations based on Indian and Northern Affairs registered populations for October 2000.

[14] Statistics Canada, 1996 Census.

3.4 Economic and Planning Context

3.4.1 Land Use

The Central Coast Land and Coastal Resource Management Plan was initiated in July 1996, to enable regional interests (marine and coastal) to work together to produce a plan for Crown land and coastal resources that considers all resources and values, and the needs and interests of the people and industries who use them. As of April 2001, agreement has been reached on the first phase of the Central Coast LCRMP, and government has provided immediate decisions to provide greater land use certainty. A range of land use zones have been confirmed by government subject to further consultation with First Nations and others. This includes:

- Candidate Protection Areas (including the Spirit Bear area of Princess Royal Island) – designated as prime candidates for future protection;
- Options Areas – signficant cultural, ecological and economic values, and merit further analysis; and,
- Special Management Zones for Visual Quality – recognized for their high tourism values.[15]

In early April 2001, the BC government created the 96,458 hectare Spirit Bear protection area, and announced that they are entering into a unique agreement with First Nations on land-use planning in BC's central and north coast regions.

The Ministry of Forests has completed the Timber Supply Review II process. This is the review of all crown forest lands that contribute to the provincial Annual Allowable Cut. On the Mid Coast, the Mid Coast Timber Supply Area and the Tree Farm Licenses were reviewed and a harvest level determined by the province's Chief Forester.

Throughout BC, the federal, provincial and First Nation governments have entered into treaty negotiations. On the Mid Coast all bands are currently involved in the treaty processes except for the Nuxalk First Nation.

International interests may also have some bearing on future land management on the Mid Coast. Since the early 1990s, the remote coastal areas of BC -- including the Mid Coast -- have received global attention from environmental groups and other interests due to its wealth of coastal temperate rain forests. As the Mid Coast contains some of the larger tracts of coastal temperate rain forest in the province, land use decisions could come under particular scrutiny if global awareness continues to grow.

3.4.2 Economic Development Initiatives

Several recent non-native economic development initiatives on the Mid Coast have been developed by the Central Coast Economic Development Commission and supported by the Central Coast Regional District

---

[15] Refer to the following website for more information: www.luco.gov.bc.ca/slupmbc/cencoast/prelim401/html

(CCRD) -- the Economic Development Commission is a function of the CCRD. It should be noted that the Nuxalk, Oweekeno, Heiltsuk and Kitasoo also have economic development functions.

The Central Coast Regional District completed a comprehensive economic development strategy in 1987. This comprehensive strategy looked at several strategy areas for the communities on the Mid Coast. Following from this strategy the Regional District has developed long-term plans at five-year intervals. Currently, the Regional District is working on the development of a new five-year plan in 2001. This plan will set priorities and task for the following year and provide long-term goals that the region will be working towards.

The Central Coast Regional District has also undertaken two other strategic planning exercises at the regional level to investigate specific issues. These are the following.

1. *Forest sector strategy:* In 1997, the Central Coast Regional District in partnership with Forest Renewal BC completed a forest sector strategy. This strategy outlined several specific initiatives to diversify and strengthen the region's forest sector economy. Since the completion of this strategy the region has worked on implementing initiatives that would increase the economic wealth generated locally from the Mid Coast extensive forest resource, including:

    - development of a log sort yard; this keeps showing up- it did not happen as it was not viable;
    - increasing the supply of fibre available for local value added processing;
    - undertaking local training to increase the skill level of existing small mill operators- in basic sawing, grading for hard and soft woods- kiln development; and
    - developing comprehensive lists of value added manufacturers outside of the area who are interested in purchasing green lumber and specialty cuts.

2. *LRMP Assessment:* In 2000, the Central Coast Land and Coastal Land and Resource Management Planning Team completed a comprehensive investigation into the economic opportunities and barriers in the region. This work focused on issues associated with infrastructure gaps and the barriers and opportunities within specific resource sectors including:

    - tourism;
    - commercial Fishing;
    - aquaculture;
    - forestry;
    - botanical forest products;
    - mining; and
    - water.

3.4.3 Previous tourism and recreation strategies and current tourism initiatives

The communities of the Mid Coast are beginning to capitalize on the region's tourism potential, and the tourism sector as a way to achieve economic diversification. However, the region has had to work diligently to address critical barriers facing the tourism sector such as lack of infrastructure and isolation. Work also continues to raise the profile of the region through marketing and encouraging new entrepreneurial investment in the tourism sector.

In the past few years, the Central Coast Regional District and communities of the Mid Coast have undertaken several tourism planning and development initiatives including the following.

- The Central Coast Regional District is working on the implementation of several tourism initiatives that were developed during the Tourism planning processes undertaken in 1999. The Tourism Strategic Action plan identified several key initiatives including working on improvements to local tourism infrastructure, communication, and promoting (through website development and improved signage) the Bella Coola Valley. The area is also working on acquiring property on behalf of the Central Coast Regional District to build an outdoor open air pavilion for arts and crafts and other events. The goals of the strategy are to increase visitor awareness of activities, and visits of longer duration.[16]

- In December 2000 the Kitasoo completed a community tourism strategy to guide tourism development over the next few years. The community of Klemtu is now working on the implementation of their local tourism strategy. Several short, medium and longer term initiatives have been identified. Adventure tourism products, training and infrastructure development are key components of the tourism strategy. Implementation has begun and specific tasks will be addressed in 2001 including development of specific tourism products, marketing, and construction of an outbuilding.

- Besides the tourism strategies and reports completed on the Mid Coast, the First Nations of the Mid Coast are now considering the establishment of a Central Coast First Nation Tourism Consortium to address:

  - economic and employment equity for Mid Coast first nations in the tourism sector;
  - issues associated with tourism growth management;
  - the development of protocol format for First Nations and the tourism industry to explore partnership opportunities; and
  - the development of human resource and capacity for Mid Coast first Nations to benefit from tourism.

---

[16] Central Coast Economic Development Commission (1999). *Central Coast Economic Development Commission Tourism Action Plan for 1999.*

3.4.4 Role of Government Agencies

There are several government agencies that are involved in, or are relevant to, tourism development on the Mid Coast. They are as follows.

The **Ministry of Small Business, Tourism and Culture** has the responsibility to ensure that tourism values and interests are available for, considered and accommodated in provincial, regional and sub-regional land, water and resource planning initiatives and in treaty negotiations. The office for this Ministry is located in Victoria; there is a field office in Williams Lake.

The **Ministry of Forest's** mandate is related to the planning and management of the timber resource while managing, protecting and conserving all forest resources, including recreation values, to ensure immediate and long term economic and social benefits they may confer on British Columbia. In terms of the role in tourism activities on the Mid Coast, the Ministry of Forests has played an active role in the planning and technical support that has gone into the Central Coast Land and Resource Management process. As well, the Ministry of Forests maintains resource inventories (Visual Landscape Inventory, Recreation Features Inventory, Recreation Opportunity Spectrum) for recreation management on the Mid Coast. The Ministry has a district office in Hagensborg.

BC Ministry of Environment, Land and Parks' stated mandate is to the protection, conservation, and restoration of natural diversity; maintaining and restoring healthy and safe land, water and air; and sustaining social, economic and recreational benefits. With regards to tourism, the Ministry is responsible for the management of BC park system through **BC Parks**. BC Parks maintains the campground and trail infrastructure inside the provincial park system and is also responsible for determining the appropriate commercial tourism activities in the parks. BC Parks maintains an office in Hagensborg.

BC Assets and Land Corporation has an office in Williams Lake that oversees activities on the Mid Coast. BC Assets and Land Corporation oversees and administers all Commercial Recreation tenures on Crown land under the Commercial Recreation Policy (this excludes alpine skiing, which has its own policy). The goals of BCAL include:

- assisting communities with their local development challenges to achieve their objectives;
- making Crown land resources and assets available to support growth and diversification of the province's economy;
- recognizing the social, environmental, and aboriginal values in the use of Crown land resources and assets;
- evaluating major government assets to determine opportunities to increase value to taxpayers;
- this agency oversees the allocation of tenures that are required to undertake tourism ventures on crown lands; and,
- ensuring that government receives full value from the management and disposition of Crown land resources and assets.

BC Ferry Corporation is responsible for ferry services to many of the communities on the Mid Coast. The ferry service plays a critical role in both economic and tourism development throughout the Mid Coast. BC Ferry Corporation's main office is in Victoria.

Tourism BC's mandate is to promote development and growth in the tourism industry, to increase revenues and employment throughout BC, and to increase the economic benefits for all British Columbians. The Crown corporation has five primary areas of focus including: marketing and sales, visitor information services, accommodation services and standards, education and training, research, and business development.[17] Tourism BC's main office is in Vancouver, and it works closely with regional tourism associations.

Forest Renewal British Columbia (FRBC) is an independent Crown Corporation that was established to manage and direct investments to renew British Columbia's Forest Economy. Among their objectives is to support forest communities experiencing major job loss. The Campbell River office of FRBC oversees activities on the Mid Coast.

Fisheries Renewal BC is an independent Crown corporation with a legislated mandate to provide all British Columbians -- including First Nations, recreational fishers, processors, local government, environmental groups, the sports fishing tourism industry and others -- with meaningful opportunities to participate in provincially-led initiatives aimed at protecting fish and renewing the fishery. The top priorities of Fisheries Renewal BC include programs for recreational fisheries diversification and development and community-based fisheries job creation strategies.

Department of Fisheries and Ocean is the federal agency responsible for the management of anadromous fisheries in BC and the enforcement of federal environmental and marine regulations. With regards to tourism, the Department of Fisheries and Oceans oversees regulations for the recreational anadromous fishery, vessel size and usage for specific ocean tourism activities, moorage regulations, and marine safety and environmental protection. The Department of Fisheries has a local office in Bella Coola.

Land Use Coordination Office plays a functionary role in coordinating Land Use Management Planning initiatives underway in British Columbia. LUCO has offices in Victoria where all activities covering the entire province are managed, including those on the Mid Coast.

---

[17] Tourism BC website: www.hellobc.com/media/corpinfo.jsp

4 THE TOURISM INDUSTRY

4.1 Introduction

Current and future tourism operators in the British Columbia need to be aware of tourism market information to compete in the global market. The future success of Mid Coast Tourism businesses relies, in part, on a good understanding of the visitors who travel to the region – their origins, numbers, preferences and how they will change in the future. With this knowledge, tourism operators can build on current businesses and successfully develop new opportunities. In this section of the report, we provide an overview of tourism demand – global, provincial and regional – and analyze the trends shaping tourism demand today and tomorrow.

4.2 Global and North American Tourism

4.2.1 Global Tourism Demand

Tourism is the world's largest economic growth sector, and this is expected to continue into the 21st century. It is also the world's largest export earner, and a key determinant of the balance of payments in many countries. Taking both direct and indirect economic activity into account, the tourism sector is estimated to comprise about 11 percent of the global gross domestic product.

Global receipts from international tourism grew at an annual rate of 9 percent between 1980 and 1996, to total $423 billion in 1996.[1] During the same period, international arrivals grew at an annual rate of 4.6 percent to reach 594 million in 1996. Statistics from the World Tourism Organization (WTO) indicate that the number of global travellers reached 664 million by the end of 1999, an increase of 4.4 percent over the previous year.[2] Projections are for one billion by year 2010. Tourism earnings are expected to more than double during the next ten-year period.

Tourism demand is strongly linked to economic growth and performance. World tourism growth was restrained in 1997-98 because economic problems suppressed Asian outbound travel. However, the fortunes of the tourism industry turned up worldwide in 1998/99, fueled by the end of the Asian economic crisis, and the buoyant economies of the G7 countries.

With the end of the Asian crisis, there has been a recovery of Asian outbound travel, particularly from Korea, Thailand and Malaysia.[3] European outbound travel to destinations including North America continues to be robust. After two years of negative results, the tourism sector in the Asia Pacific region increased at 11.1 percent in 1998/99, the best performance in the world. Other tourism hot spots included the Middle East, Africa and South Asia.

---

[1] Source: World Tourism Organization

[2] World Tourism Organization, *Tourism Highlights 2000*. August 2000.

[3] World Tourism Organization statement, December 1999

Total inbound travel in North America was 87.3 million arrivals in 1999. Annual growth was 2 percent between 1995 and 1999. Canada's market share of North American tourism rose from 15.5 percent in 1995 to 15.9 percent in 1999, while the shares of the US and Mexico declined slightly.

The outlook for global tourism in 2001 is positive, however the predicted loss of economic momentum in the US and Europe could dampen world trade flows[4], and slow the rate of tourism demand somewhat. This notwithstanding, the long term outlook for global continues to be promising.

Travel and tourism generates about 100 million jobs worldwide, with most employment occurring in small or medium-sized businesses.[5] The WTO indicates that job creation in tourism is growing 1.5 times faster than in any other industrial sector. All of these optimistic data point to the emergence of the tourism industry as a prime driver in the world economy, and as an importance source of diversification.

With its unique physical, cultural and historical setting, Canada enjoys a significant share of this global tourism activity, and its resources are only beginning to be tapped. Canada presently accounts for 2.9 percent of the world's international visits, two percent of world's tourism earnings and ranks as the world's ninth most popular tourist destination.[6]

Adventure travel and ecotourism are the fastest growing components of the North American tourism industry. Both appeal to middle class or higher income travellers seeking excitement and an authentic outdoor experience. Adventure travel has been defined as follows:[7]

> An outdoor leisure activity that takes place in an unusual, exotic, remote or wilderness destination, involves some form of unconventional means of transportation, and tends to be associated with low or high levels of activity.

Ecotourism generally encompasses those adventure travel experiences with a low impact and non-consumptive nature. Clearly, there is a great deal of overlap between adventure tourism and ecotourism, but neither is well defined, and consequently few sound statistics are available for either category. However, there is little question that the demand for adventure tourism and ecotourism products will continue to swell, as more travellers – domestic and abroad -- with "greening" attitudes seek out unique outdoor experiences.

A study carried out in 1996 shows that the potential North American ecotourism and related market was approximately 58.9 million people.[8] Of this, Canada accrued less than one percent during that year, or 160,670 person trips. This has tremendous potential to grow, in Canada and British Columbia. Canada has a global reputation for its abundant and pristine wilderness, and its unparalleled scenery. British Columbia holds very strong appeal for North American and overseas travellers drawn to adventure and ecotourism activity. A national study carried out in 1997[9] highlighted several important factors shaping future demand for British Columbia tourism products:

---

[4] Scotiabank Group, *Global Outlook*, January 2001.

[5] World Trade Organization.

[6] Source: Canadian Tourism Commission

[7] Tourism Canada, February 1995.

[8] Randolph Group 1996. *Adventure Travel and Ecotourism in Canada: Strategic Directions to the 21st Century: Final Report.* Canadian Tourism Commission.

> Based on product appeal/uniqueness, BC adventure/ecotourism products are highly competitive with those in the US.
>
> The same is true when comparing BC products with those in Europe – while the long distance to Canada make them less accessible from Europe, for many visitors this is offset by the perceived "exoticness" of Canadian wilderness adventure/ecotourism products.
>
> "Only our most unique Arctic safari type products or Pacific Coast/Rocky Mountain adventures can compete in terms of product appeal/uniqueness with popular international adventures products as African safaris, trekking in the Himalayas…[10]"

Adventure/ecotourism is still a young industry, and the opportunities in British Columbia -- particularly outside the "golden triangle" of Vancouver, Whistler and Victoria -- are relatively untapped. While the backcountry of Canada and BC hold great promise, a lack of infrastructure, poor accessibility and service quality which often does not match that of the US or Europe are all challenges to realizing its full tourism potential.

Despite these challenges, over the next decade British Columbia will take a more dominant role in the Canadian adventure and ecotourism sector, as travellers and recreationists develop more demanding tastes, and go further afield to experience wilderness, culture and history.

4.2.2 Tourism in British Columbia

Tourism ranks as the tenth largest economic sector in British Columbia (based on GDP activity). In 1999, there were 22.3 million overnight visitors in BC, increasing 2.2 percent over 1998. These visitors injected $9.2 billion in tourism revenue into the provincial economy. Tourism also generated approximately 106,830 direct jobs in 1999.[11]

Table 4.2-1: Overnight Visitor Activity in BC - 1997 to 2000

	# overnight visitors (millions)	**Revenues (billions of $C)**
1997	21.4	$8.5
1998	21.8	$8.8
1999	22.3	$9.2
2000 (estimate)	22.6	$9.4

Source: Tourism British Columbia

---

[9] The Randolph Group (January 1997). *Adventure Travel and Ecotourism in Canada: Strategic Framework for Development.* Prepared for the Canadian Tourism Commission.

[10] Ibid.

[11] Source: BC Statistics, *Tourism Indicators.*

Recent statistics show that 30 percent of overnight visitors in BC are from "short haul" regional Canada and US. Another 15 percent are North American "long haul" visitors (other provinces, US and Mexico). Overall, non-resident visitors comprised 52 percent of overnight visitors to BC, while British Columbians made up the remaining 48 percent. This is a dramatic contrast with 1995/96, when British Columbians accounted for 61 percent of overnight visitors to the province. It points to the growing importance of visitors from outside the province.

While the share of non-BC resident visits is growing, there is no doubt that the US is still the dominant market for the BC tourism sector. US overnight visitors totalled 5.1 million in 1999, making up 45 percent of all non-resident visitors. Visitors from "short haul" Canada accounted for another 3.7 million during the same year, while visitors from "long haul" Canada comprised another 1.2 million.

While data is not yet available, Tourism BC has estimated that the total number of overnight visitors to BC was 22.6 million in the year 2000, generating $9.4 billion in revenue.[12] This is a 3.4 percent increase in revenue over 1999. Prosperity in Alberta and Ontario (BC's two largest out-of-province markets), coupled with a low Canadian dollar, are driving the Canadian demand for tourism in BC. The buoyant Canadian, US, European and Asian economies, and a weak Canadian dollar have also been also factors in BC tourism growth.

As a world-recognized transportation and economic hub, Vancouver already has the infrastructure and the profile to attract North American and international visitors. However, a review of world tourism statistics supports the view that Canada gets only a small share of all international travellers, and BC an even smaller share of that. Those that do come to BC are often inclined to stay within the Golden Triangle (Vancouver-Victoria-Whistler), or avail themselves of tourism products that can be accessed relatively easily. Examples include the Rocky Mountaineer from Vancouver to Jasper, the Trans-Canada Highway to Alberta, or features in and around the Lower Mainland or South Vancouver Island. This presents a significant challenge to tourism operators outside Southwest BC who are trying to enlarge their market and attract international visitors.

4.3 Tourism in the Cariboo Region

Up-to-date and comprehensive tourism data is largely unavailable for sub-regions of the province. The best source of regional data is derived from a tourism survey conducted by Tourism BC in 1995 and 1996. The results are embodied in the *British Columbia Visitor Study*, a compendium of provincial and regional tourism data that characterizes the resident and non-resident components of the BC tourism market.

The 1995/96 survey data is aggregated according to large geographic areas of the province, including the Cariboo Tourism Region. The Cariboo Tourism Region encompasses the Cariboo Forest Region in the Central Interior (which, in turn, is made up of five Forest Districts) and the Mid-Coast Forest District. This combination of two highly divergent areas of the province presents a problem in trying to apply the results for the entire Cariboo Tourism Region to the Mid Coast component. The tourism resources and activities in the Cariboo Forest Region are largely land-based, and entirely different from those on the Mid Coast, which has significant coastal and mountain components and corresponding activities. There is some regional data, however, that has a bearing on the Mid Coast tourism sector:

---

[12] Tourism BC (2000). *Ibid.*

- The Cariboo accounts for a small share of total tourism activity in BC. In 1995/96, six percent of non-residential and BC resident visitors respectively travelled to the Cariboo. Only northern BC comprised a smaller share.
- About 70 percent of BC resident visitors to the Cariboo Region were from the GVRD or southern BC.
- Almost 60 percent of non-resident travellers to the Cariboo Region were from regional Canada and US.
- Approximately one quarter of non-resident visitors to the Cariboo cited outdoors/wilderness activities as their prime purpose for visiting, and 29 percent of resident visitors. This is a significant increase from 19 percent overall in 1989.[13]

4.4 Tourism in the Mid Coast Forest District

4.4.1 Tourism Profile

Tourism is a major economic force on the Mid Coast during the summer months. Historically, most visitors have been attracted by sports fishing – both fresh and salt water – with a large number destined for the outer coast sportsfishing lodges. The Dean River is also a target for steelhead and enjoys a steady clientele. Many anglers travel to the Bella Coola River system for the spring and coho salmon season. However, a growing proportion of visitors are now travelling to Mid Coast to enjoy other activities such as kayaking, boating, hiking, nature observation and skiing.

The tourism season on the Mid Coast can start in early April and extend to October. Historically the tourism season has been short, extending from late June to early September, with a short extended season into the beginning of October for river coho fishing. In the past there was little or no winter tourism, but recently the opportunity for winter sports (snowboarding) in the Rainbow Range of Tweedsmuir Park has proven to be successful. There is also good potential for snowmobiling as a tourism draw.

Most visitors to the Mid Coast during the summer months are travelling on a circle route that links the Discovery Coast Passage ferry with road travel on Highway 20. BC Ferries' data for 1999/2000 shows that almost approximately 7,500 passengers travelled either to or from the Mid Coast in the summer of 1999. A large proportion of these passengers were tourists. Data from the Ministry of Transportation and Highways shows that the Summer Average Daily Traffic near Bella Coola in 1995 was 189 (it is likely at a comparable level today, but no data is available). This means about 17,000 vehicle movements (in both directions) over the three month summer period. As discussed earlier, about half of the traffic (8,500 vehicles) during the summer months is tourism-related. Most of this is either en route to or from the ferry.

In addition to ferry and vehicular traffic through the Mid Coast, many visitors travel by air to the Mid Coast during the summer months, destined primarily for the sportsfishing lodges. Private vessels are also an important source of tourists, as many privately owned crafts travel to the Mid Coast during the summer months. It is estimated that well over 400 boats tie up at Mid Coast marinas and wharves each season.[14]

---

[13] ISTC, Min. of Tourism and Min. of Regional and Economic Development. *Visitor '89: A Travel Survey of Visitors to BC.* August 1990.

Despite the short season, the tourism industry is an important economic contributor to the regional economy. A recent inventory of existing tourism operators on the Mid Coast shows that there are approximately 160 businesses in the region that depend, either fully or partly, on tourism.[15] This includes accommodation, restaurants, transportation operators, campgrounds, tours, guide outfitters, and other types of operations. With the decline of the forest and fishing sectors on the Coast, tourism is emerging as another way to sustain economic viability. In 1996, forestry comprised 26 percent of income on the Mid Coast, the public sector 37 percent, and tourism 10 percent.[16] Given developments on the Mid Coast over the past few years, the dominance of forestry has likely declined somewhat, while that of tourism has probably grown.

Traveling to the Mid Coast for specific holiday activity is also growing, particularly within the adventure tourism activities. Among the adventure tourism products on the Mid Coast, only recreational fishing could be considered an established activity. For the most part, all other products are in their initial growth phases. Historically, the typical sports fisher has arrived and left by air, spending one to two weeks at a fishing camp, or come by camper and been self-sufficient in terms of supplies. Increasingly, families are coming along on sports fishing trips and, consequently, seeking out other activities besides fishing during their stay.

The Discovery Coast ferry and tour buses are bringing in more non-traditional tourists who appear to spend more time in the area, visiting tourist and cultural attractions, and shopping. Ecotourism's popularity is growing, and being used as a new promotion idea with the sportsfishing lodges and the guide outfitters.

There are some indicators of general tourism trends on the Mid Coast, including room revenues, provincial park data, and recreational fishing data. These are discussed below.

Room Revenues: Room revenues in the Central Coast Regional District have increased in almost every year except 1998. Annual room revenues in 1992 were $562,000, increasing every year to $988,000 in 1997. Revenues then declined to $959,000 in 1998.

---

[14] Sources: conversations with Bella Coola Harbour Authority and operator of Shearwater Marine.

[15] Clover Point Cartographics, Database of Mid Coast Tourism Operators, 2001.

[16] BC Ministry of Finance and Corporate Relations. *BC Local Area Economic Dependencies and Impact Ratios.* 1996.

Table 4.4-1: Room Revenues in the Central Coast Regional District

Year	(thousands of $)
1991	635
1992	562
1993	700
1994	745
1995	832
1996	946
1997	988
1998	959
Annual percentage change, 1991 to 1998	*6.1%*

Source: BC Statistics

Park Use: BC Parks tracks the number of visitors to its major parks every year, both campground attendance and day use. These numbers are a good indicator of whether outdoor recreation use is increasing or decreasing in an area. The Hakai Recreation Area and Tweedsmuir Park are the largest provincial parks on the Mid Coast. Attendance information is available for Tweedsmuir Park, but it is our understanding that it has not been regularly collected for the Hakai in several years. Table 4.4-2 shows campground attendance at Tweedsmuir South and North, and Day Use at Tweedsmuir South.

Table 4.4-2 Attendance at BC Parks in the Mid Coast Region (# of parties)

	1991	1994	1998	1999	2000
Campground Attendance					
Tweedsmuir South	3,677	4,025	2,673	2,938	3,321
Tweedsmuir North	193	386	n/a	n/a	n/a
Day Use					
Tweedsmuir South	17,962	20,940	17,526	18,421	16,850

These numbers indicate that campground attendance at Tweedsmuir South has declined between 1991 and 2000, but that numbers have risen during the past three years; at the same time day use has been declining.

Recreational Fishing: Recreation fishing is an important element of the west coast tourism sector. Saltwater fishing dominates on the Mid Coast, although there is some freshwater angling in the Dean and Bella Coola River systems. The Department of Fisheries and Oceans collects recreational saltwater fishing license data for all it regions on the BC Coast. Table 4.4-3 outlines the total number of purchases of non-resident and resident fishing licenses between 1995 and 1999 for the DFO District # 7 (approximately the Mid Coast).[17]

---

[17] DFO's District # 7 includes all communities in the Mid Coast as well as Kitimat and Kemano, which are outside the Mid Coast Forest District. Kitimat and Kemano account for a relatively small proportion of total fishing activity.

Table 4.4-3: Selected Saltwater Fishing License Category Purchases (1995 to 1999)

License Category	1995	1996	1997	1998	1999
Non-Resident (1 day licenses)	158	1,159	842	657	675
Non-Resident (other licenses)	3,556	2,991	2,942	2,762	3,019
Annual resident	4,647	2,755	2,730	2,535	2,499

Source: Department of Ocean and Fisheries.

Non-Resident (other licenses) includes licenses purchased for various durations ranging from three days to an annual license. The foregoing data shows that between 1995 and 1999 there has been a decline in licenses of longer duration, for both resident and non-resident fishers. Conversely the number of one day licenses has increased over the same time period. This shift has been driven by a complex combination of factors, including new fishing regulations and changes in the perceptions of fishers.

The BC Ministry of Environment, Lands and Parks collects information on freshwater sport fishing activity (number of anglers and number of days fished), however it is for the entire Cariboo Region, and there is no information solely for the Mid Coast.

4.5 Trends in Tourism and Recreation[18]

Tourism is a global and multi-faceted industry, driven by many influences. A wide range of activities also characterizes tourism and niches are changing as tourist preferences evolve. While the main emphasis of this report is on wilderness activity and the ecotourism market, it is important to provide a context by identifying some of the key forces driving the demand for tourism. In this section, key factors shaping the nature of the market for tourism are identified, and the meaning for tourism development in the region is discussed.

4.5.1 Social and Demographic Trends

Population and Life Stage: The North American population is growing and getting older. Between 1946 and 1964, approximately 10 million Canadians and 75 million Americans were born. This age cohort, the Baby Boomers, accounts for one third of all Canadians today, and 28 percent of all Americans. As the Boomer cohort has advanced through life, it has been a major market force, dominating earnings, savings, and consumption patterns no like previous generation. The Boomer cohort entered its highest earning years[19] beginning in 1991. This phase will wind down by year 2018, as the youngest Boomers move past age 55.

The Baby Boomer generation is the first to enjoy widespread travel, even at a young age. This can be ascribed to the dramatic growth in the post-war economy – with corresponding rises in family incomes – and the global build up of transportation infrastructure, making travel far more accessible than in the past. With travel as an integral part of their lives, Boomers can be expected to continue travelling throughout their lives, although their preferences and needs will change. These forces have profound implications for current and future tourism demand.

---

[18] Excerpts of this discussion are drawn from the 2000 report, *Forest and Fisheries Tourism Opportunities Study for the North Coast Forest District, March 2000.* Authors: Clover Point Cartographics, Geoscape, Marlyn Chisholm & Associates, and Sunderman & Associates.

[19] Generally between ages 45 to 55.

The Baby Boomer cohort is widely recognized as the primary target for marketing tourism products. A large share of the Canadian Tourism Commission's marketing budget is directed at the 45+ market, due to its size and long term prospects. While many in the Boomer generation still travel with their families now, these families will grow up, leaving empty nesters with more disposable income to spend on travel. This points to a growing demand for holidays that cater to couples, and provide a high level of service.

More income is now being concentrated in the hands of the Boomers as they experience their peak earning years, and as the result of inter-generational transfers, in the form of inheritances. Part of this discretionary income will be spent on travel. Increasingly, travellers are seeking, and can afford, "high-end" vacations that offer high quality services and a degree of luxury, such as stays at destination resorts, or marine cruises.

The age 35 to 44 segment of the population also represents a significant market for tourism activities. This age group tends to travel with their families, or seek more active, adventure-oriented holidays.

"Time Poverty": Time – and its availability – is a key determinant of tourism demand. People with families and/or at the peak years of their career are experiencing a leisure time squeeze. While they have the money to travel, travellers short on time generally pursue shorter, more frequent holidays, often within the same time zone. There is also a trend towards combining holidays with business travel. This has led to an increase in the popularity of hassle-free, all-inclusive holiday packages.

Consumer tastes and attitudes: Here at the beginning of the 21st century, the high standard of living in the western economies has produced travellers who are more highly educated, and well traveled, than ever before. They also have a much larger choice of tourism experiences, both domestically and abroad. Travel is no longer a novelty.

As the choice of tourism products grows, many tourists are turning away from conventional, group-oriented holidays to experiences that offer more than just escape. Tourist preferences are evolving as society becomes more affluent and industrial, away from mass consumption and towards meaningful experiences that add value to one's total experience. This re-shaping of consumer attitudes is, in part, fueled by environmental concerns.

Many tourists today are seeking an "authentic" experience. While there is clearly still a market for mass travel destinations, there is a significant and growing market for travel experiences that engage the participants in active, genuine and unique events, for example:

- observing native traditional dance ceremonies in Klemtu or Hartley Bay;
- wildlife viewing in a natural setting, rather than at a zoo or aquarium;
- winter activities in the Yukon (which draws many German tourists annually);
- guided bicycle tours in California vineyards;
- pocket cruises that offer unique wildlife viewing or access to hotsprings.

These experiences often involve some element of physical or mental challenge, and confer a sense of achievement. Increasingly, travellers want to learn as part of their vacation. This marks an important shift in tourist preferences away from contrived or staged experiences to those which impart enrichment, learning, and a special experience. It also points to continuing growth in the demand for adventure tourism products.

Strenuous activities or hard adventure experiences requiring some degree of stamina and fitness will generally appeal to younger age groups (e.g., ages 24 to 35, or younger). Hard adventure refers to products like whitewater rafting, heavy trekking, mountain climbing, cross-country skiing or kayaking. Soft adventure is considered travel with mild physical activity to an interesting area with comfortable accommodation, emphasizing visual excitement. It encompasses activities such as wildlife and bird viewing, on-road bicycle tours, and boating. Soft adventure products are particularly appealing to Baby Boomers and older travellers.

The operator who is marketing a specific product should carefully consider his or her target market, and practical considerations such as time availability, physical limitations and family needs. For example, affluent people in their peak earning years are often the ones who can best afford heli-skiing. However, they may not have the time, money, or the stamina, to ski for more than three or four days. It is therefore important to develop the product accordingly, and to make other activities available to these visitors and their families during their stay.

Ecotourism is the fastest-growing tourism product area today, and one with a great deal of potential in Canada. It generally involves low-impact nature-based experiences and emphasizes learning (biology, history or culture). Trip length varies tremendously, and is generally determined by activity and destination, rather than market. Recent ecotourism research shows that ecotourists are interested in more than the conventional hotel/motel options, or camping. They indicate a preference for rustic, intimate and adventure-type accommodations.[20] The most popular activities in this niche are predicted to be hiking, camping, boating, fishing and cycling. Ocean kayaking, particularly relevant to the Mid Coast, is one of the fastest growing segments of the marine sport industry, and there is a growing market for kayak tourism to exotic destinations all over the world.[21]

Travellers are interested in experiencing new cultures and, in Canada, there is a fascination with the aboriginal people and their cultures. Ecotourism is a good fit with aboriginal tourism because both niches appeal to a similar market, and in both cases value is placed on the preservation of the attributes and people of an area. Aboriginal tourism holds significant potential on the Mid Coast because of its integral role in the history of the region, and its widely acknowledged importance from the perspective of culture, history and archaeology.

An Angus Reid poll in 1993 elicited travellers' interest in Canadian aboriginal tourism products. The results show a high level of interest in visiting heritage sites and in purchasing aboriginal crafts and art. Europeans, in particular Germans and British, demonstrate an interest in aboriginal tourism while Asian interest is generally low. Industry representatives point out, however, that while visitors are interested in aboriginal culture, it does not generally comprise a draw in and of itself.[22] It is generally seen as one interesting element of a larger tourism product.

---

[20] Wight, Pam and Associates (March 1999). Market Analysis for Gwaii Haanas National Park Reserve/Haida Heritage Site. Prepared for Archipelago Management Board.

[21] Wight, ibid.

Recent research on the aboriginal culture market shows that the Italian, UK and German markets hold the largest potential for attracting aboriginal culture travellers. Together, they could generate 8.3 million aboriginal culture travellers to Canada over the next five years.[23]

4.5.2 Global economic growth

As a "luxury" good, tourism demand fluctuates with economic cycles. This was demonstrated in 1999, when international tourist arrivals grew by 4.4 percent, after two years of "flat" growth. The World Tourism Organization points out that these estimates reflect a notable recovery of Asian outbound travel, with the end of the Asian economic crisis in 1997 and 1998.

While the tourism sector will continue to grow in Canada and abroad, periodic economic downturns will have a direct effect on year-to-year tourism activity. Exchange rate fluctuations will also clearly have an effect on the marketability of Canadian tourism experiences vis a vis those in other countries, as they have in the past.

4.5.3 Technology and the Internet

The explosion of the Internet in all aspects of our lives is beginning to revolutionize marketing, planning and booking trends in the travel industry. A web-site on the Internet is now essential for most tourism operators hoping to attract visitors. The World Tourism Organization Business Council recently released a study that reveals that the four main tourism generating markets worldwide are also the four biggest users of the Internet. As a group, the United States, Germany, Japan and the UK account for two-fifths of world travellers and close to 80 per cent of Internet users. The WTOBC states that "if a destination is not on the Web then it may well be ignored by the millions of people who now have access to the Internet and who expect that every destination will have a comprehensive presence".[24]

The Internet provides not only a huge electronic marketplace, but also cost benefits. In this sense, it is a great "equalizer". The Internet presents a very economical and direct way for operators large or small to make their product known to a wide audience, at a relatively low cost.

The Internet is also becoming an important travel-booking tool. Prospective buyers are using it to evaluate products and, often, to buy their travel products. Some selected examples are as follows.

- E-ticketing is now available on most major airline carriers.
- Reservations and tickets for travel on BC Ferries, rail tours like the Rocky Mountaineer, and at many hotel and other accommodations throughout BC, can be purchased on the Internet prior to travel.

---

[22] Discussion with tourism broker, February 2000.

[23] Canadian Tourism Commission. *Demand for Aboriginal Culture Products in Key European Markets.* 2000.

[24] World Tourism Organization Business Council (1999). *Marketing Tourism Destinations Online: Strategies for the Information Age.*

- More travel agencies affiliated with Cruise Lines International Associates (CLIA) are using the Internet for conducting business and marketing. One third of these agencies took bookings from a client via the Internet in 1999.[25]

Tourists today are drawing from a greater selection and desire to maintain more control of the products they choose. Technology and the Internet are instrumental in helping to meet these requirements.

4.5.4 Competition

There is growing concentration in the North American tourism sector, marked by a small number of large operators, and a large number of smaller, niche tour operators. Small operators who are unable to compete on the basis of price or quality in the mass markets can choose to merge with larger operators or focus on delivering in a specialty, niche market.

The trend towards concentration is an important one to note on the Mid Coast, where the market is fragmented and characterized by several, competing operators. To compete in the world market, the Mid Coast needs to be jointly marketed as a "product" with its own image. This means a united effort by operators in the area to develop an image (the Mid Coast as a product) that can be promoted worldwide. The Mid Coast shares spectacular features with other "exotic" destinations (for example New Zealand or Ireland), but it lacks a global profile.

On the demand side, travellers are becoming more demanding about what they buy and how much they pay. They are growing less confident in the ability of travel agents to deliver the best price. For this reason, more are turning to the Internet for pricing. While a relatively new phenomenon, Internet bidding sites for travel are growing and will continue to be the place where consumers go to buy their travel products. The Internet effectively provide a global marketplace for travel, and other, products.

Increasingly, tourism operators will be called upon to deliver flexible pricing, and to meet specific needs. This means more focused and customized holiday packages.

4.6 What Does This Mean for Tourism on the Mid Coast?

- Future tourism growth in Canada and British Columbia will be driven by interest in outdoor experiences, particularly those in the soft adventure market and ecotourism.

- The Mid Coast has the attributes and appeal to draw domestic and international visitors seeking authentic wilderness, adventure and cultural experiences. The demand exists for what the Mid Coast has to offer and more travellers are being attracted to British Columbia every year. In terms of attracting international markets, the Mid Coast can tap into the unique strengths that it shares with the rest of BC, including:

---

[25] Cruise Lines International Association (1999). *Benefits Study.*

- a reputation for abundant and pristine wilderness resources,
- an image as an uncrowded and unspoiled holiday destination, and,
- a wide diversity of wildlife.

The challenge is to draw visitors off the beaten path to some of British Columbia's most spectacular, and lesser known, wilderness and scenery.

- The demand for outdoor and wilderness experiences is here to stay. In the long term, as carrying capacity is approached at other tourism destinations elsewhere in BC and the world, the Mid Coast will increasingly be valued, and sought out, for its pristine qualities.

- BC residents comprise 60 percent of visitors to the Cariboo Region. While tourism demand from outside the province will continue to grow, tourists who reside in BC will continue to be an economic mainstay for the Cariboo and the Mid Coast.

- There is a need for operators to fully understand their market, and to ensure that the product matches the market. Factors such as age, abilities, time constraints and preferences should be taken into account when developing, and marketing, a new tourism product. Operators who choose to concentrate on drawing visitors from outside BC and from abroad need to know that, in the global tourism market, Canada is seen as one of many tourism products. Most non-resident or international tourists will only be attracted to outstanding and unique experiences that offer a level of service and quality on a par with other exotic destinations.

- Competition between operators and products is stiff, and this will continue to be the case. Operators need to find market niches or align with other operators or partners in order to avoid being squeezed out by larger interests. Clearly, strategic use of the Internet is one way of ensuring a broad market with relatively low costs, in a market where this is now a basic expectation.

Fiordlands: photo by Warren Fox

5 RESOURCES OF THE MID COAST

5.1 Study Area and Features

The Mid Coast is a land of contrasts. Steep sloped fiords link the jagged snow surrounded peaks of the inner coast to the rugged shores of the outer coast. Lakes and rivers, some with towering cliffs, some with beaches and many with an abundance of fish are found throughout the Mid-Coast.

The low lying outer coast is composed of rocky islands and archipelagos of scrub cedar, hemlock and pine forests interspersed with bogs and small lakes. The rugged shore winds into inlets, coves, lagoons, and narrows. Beaches, estuaries and mud flats intersperse the landscape. The coast can be tempestuous then mild. Rain, fog, clouds and mist dominate many days and evoke an air of mystery. The ocean dictates the lives of the animals and people that live on the land.

The fiords that extend into the interior are steep, dramatic and inhospitable. River valleys with estuaries and coves reach in, providing a welcome respite. Some of these valleys are large and lead far inland. To the east, these valleys have provided a trade route between the inland and coastal peoples. The Coastal Mountain Range is a vast, jagged, unforgiving landscape that is spectacular. Glaciers and icefields extend down from the grey granite ranges to the headwaters of the rivers. The red rounded interior mountain range provides a contrast to this bold landscape.

Wildlife and people have lived on the edges of these towering mountains, the rugged shores and the pervasive weather. They lived on the bounty of the ocean and the rivers. It is an abundant land and humans have presided here for over 10,000 years. Over the course of time, a rich culture full of art, stories, knowledge and trade flourished. Wars were fought and alliances made. The presence of the First Nations can still be felt and seen among many of the people who reside here. The land attracted other people from distant countries who took part in the harvesting of the seas and the land. Their presence can be seen in a number of structures and in the people. Unfortunately, the structures that all the people built were made of wood and these continue to be reclaimed back into the forest from which they came. Today there are vestiges and the visitor is left with the ambiance and his or her imagination of human settlement and activity in this land.

5.2 Resource Area Description

The varied landscape of the Mid Coast offers diverse physical features that are a resource for recreation activities. As a framework for depicting and mapping the inherent opportunities of the Mid Coast, the landscape has been divided into a six resource areas or geographic units. The study team defined these units based on physical landscape similarities, and also considered market access, theme development potential, and geographical relationships. For example, the low lying island groupings of the outer coast have all been grouped into one unit while identifying the proximity to certain communities and resource potential.

The six geographic units – and key sub areas within each unit -- are described in the following table. The community or communities associated with each unit has been further identified, as has a list of general recreation activities.

Table 5.2-1: Unit Descriptions

Sub Areas	Key Communities	Comments	Recreation Activities
OUTER COAST (Geographic Unit 1)			
Swindle – Price	Klemtu	Swindle and Prince Islands are low elevation islands with bog forest and rugged coastlines and separated by Higgins Channel. The west coast is exposed with a large bay (Kitasu) providing a degree of shelter.	Kayaking, Boating, Fishing
Vicinity Bella Bella	Bella Bella	Archipelago with the larger islands of Athlone, Campbell , Dufferin, Denny, Chatfield and Cunningham defining the boundaries. Low elevation slopes with extensive rocky shoreline, inlets and coves. Combinations of open seas and sheltered coastline.	Kayaking, Boating, Fishing
Hakai Recreation Area	Bella Bella	Comprised of Hunter, Hecate and Calvert Islands and including the Goose Island group almost 20 kilometers to the west. Many small island groupings sprinkle the west coast. Includes Hakai Recreation Area, a 123,000-hectare area encompassing a large archipelago of outstanding natural beauty and recreational value. A varied and scenic coastline from fully exposed shorelines to rolling, forested hills and 1000-metre peaks. Special features such as lagoons and reversing tidal rapids, beaches, all-weather anchorages, tombolos, and an intricate network of coves, inlets, and channels	Kayaking, Boating, Fishing
Namu to Dawsons Landing	Dawsons Landing Bella Bella	From Namu to Dawsons Landing along Fitz Hugh Sound the area is comprised of mid elevation ridges, a number of bays in which to shelter, the Koeye River, Fish Egg and Elizabeth Lagoon, Elizabeth Lake and the mouth of Rivers Inlet.	Kayaking, Boating, Fishing
Smith	Dawsons Landing	Remote section that includes the open seas, rugged shores and beaches of Cape Caution, north to the long narrow inlets and rocky shores of Smith Sound. Low and mid elevation ranges.	Kayaking, Boating, Fishing
FIORDS & LAKES (Geographic Unit 2)			
Fiordland – Roderick	Klemtu	Renowned for the high, steep cliffs that flank the fiords in Fiordland Provincial Park, the sub-unit extends south to include Roderick, Pooley and Dowager Islands and the west shores of the Don Peninsula. Mid elevation ranges with rocky outcrops dominate these landscapes. Roderick and other lakes are scenic with steep granite cliffs.	Kayaking, Boating, Fishing
Spiller – Ocean Falls	Ocean Falls Bella Bella	Spiller Chanel is a medium length channel with high scenic, historical and natural values. It leads to Ellerslie Lake, a large lake ringed by high granite bluffs and sandy beaches. This unit reaches further east up the Dean Channel to Cascade Inlet to include Ocean Falls and Link Lake. Medium and high elevation ranges dominate the unit.	Kayaking, Boating, Fishing
CHANNELS (Geographic Unit 3)			
Dean	Bella Coola Ocean Falls, Bella Bella	The Dean Channel extends to Kimsquit River and is surrounded by high mountain ranges that slope directly into the channel. Small bays, hotsprings and river valleys line the rocky steep shores of the channel.	Boating, Fishing
Burke to Bentinck	Bella Coola Bella Bella	Similar to the Dean in geography, includes the sheltered Kwatna Inlet.	Boating, Fishing
OWEEKENO LAKE (Geographic Unit 4)			
Oweekeno Area	Oweekeno	Oweekeno Lake is a long scenic lake flanked by steep scenic ridges. The lake is situated from west to east and abruptly heads north. High mountain ridges comprise this unit.	Boating, Fishing

Smith Area	River Inlet	Remote narrow inlets flanked by steep mountains.	Boating, Fishing
MOUNTAINS & TRADE ROUTES (Geographic Unit 5)			
Kimsquit Dean	Bella Coola	These scenic valleys link the Dean Channel with the interior. Traditional trade routes (grease trails).	Hiking, Fishing
Bella Coola	Bella Coola, Hagensborg	The Bella Coola Valley links the North Bentinck with the interior. Traditional trade routes (grease trails).	Road Tours, Fishing, Hiking, Snowmobiling
Noeick Macmell	Bella Coola	Typified by high coastal mountains and expansive icefield /glaciers.	Ski tour, Hiking
Tweedsmuir	Bella Coola	Tweedsmuir Provincial Park, a 895,000-hectare park is accessed from Highway 20, east of Bella Coola. The park encompasses a diversity of landscapes including the rugged gray coastal mountains and the gentle sloped reddish interior range. Lakes and rivers enhance this unit.	Hiking, Canoeing
PRINCESS ROYAL ISLAND (Geographic Unit 6)			
North	Hartley Bay	Low to Mid elevation mountains, large lakes, deep inlets and rocky shores typify this unit.	Kayaking, Boating, Fishing,
West	Hartley Bay, Klemtu	Low to mid elevation mountains, deep inlets and rocky shores typify this sub-unit.	Kayaking, Boating, Fishing
Butedale to Laredo Inlet	Klemtu	Spectacular granite cliffs flank Anchor and Butedale Lakes while scenic rocky outcrops are typical in the many other lakes and the deep inlet (Laredo) that bisects Princes Royal Island.	Kayaking, Boating, Fishing

5.3 Product Selection

The Ministry of Small Business, Tourism and Culture developed a preliminary list of over 50 potential tourism activities as a starting point for determining which offer the greatest potential for outdoor recreation-based tourism on the Mid Coast Forest District. The consultant team generated a short-list based on knowledge of the resource base, market trends and economic considerations, priorities defined by the funding agencies, and experience conducting similar studies in other parts of BC. A key consideration was the degree to which local communities could be involved in the development process.

The short-list of tourism activities was presented at the initial meeting of the Advisory Team. The team members were tasked with identifying which represented, in their opinion, the most potential for opportunity development. When the final results were tallied, a general consensus was reached regarding which tourism activities merit further research. The activities were then analyzed respectively and grouped or singled out as specific *tourism products*. Each tourism product may represent a number of activities that have a common relationship.

The nine tourism products evaluated are:

- Culture Heritage
- Ocean Kayaking
- Nature Observation
- Marine Cruising
- Road Touring
- Destination Lodges
- Hut to Hut Systems
- Adventure
- Air Tours

These final products can be regarded as the best short-term options for outdoor recreation-based tourism products. However none exist in isolation, and opportunities to build on clusters of tourism products or where products could be linked are extremely important and are described in this report.

The products selected should not be considered an all-inclusive list as there are likely other tourism products or activities not evaluated for in this study, which have enormous short or longer term potential. For example, as the primary focus for tourism development in this study is outdoor recreation products, an activity such as a festival or cultural event, which may have high potential in the short term, was not evaluated.

Each of the selected tourism products was further evaluated to determine the land's suitability to support the product. The results of this analysis are documented in the following section (Section 6 Product Assessment) and depicted in the suitability maps. Suitability maps illustrate existing or potential tourism opportunities taking into consideration a range of constraints.

The criteria guide for each of the chosen products is identified in the following table.

Table 5.3-1: Product Descriptions

Product	Associated & Complementary Activities/Products	Resource Requirements	Delivery Models	Development Consideration	Comments
Ocean Kayaking	Hiking/ Backpacking Marine Cruising Cultural Heritage Nature Observation Destination Lodge	Sheltered coastline, beaches, level areas, freshwater	Mothership Base (circle) Base/Satellite Expedition (linear)	FN Heritage sites Environmental	Appears suitable to the outer coast
Air (Helicopter/ Fixed Wing)	Fishing Hiking Touring Biking Skiing Nature Observation	Rivers/Lakes Open terrain Scenic areas (bluffs, etc) Opt. snow conditions.	Tours Access	Environmental Unreliable weather	Shorter distances of recreation resources from base is most profitable. The air product is closely linked to communities and lodges and may require primary industry use.
Nature Observation	Scenic Viewing Herring/ oolican run Grizzly Bird watching Nature Interpretation Marine mammal Cultural Heritage	Reliability of sightings Safe Viewing areas Scenic/Unique features Trails/ Platforms	Boats (incl. drifting) Buses Hikes	Environmental Habituation	Anchor species include Grizzly and Whale species. Other flora and fauna provide an important compliment.
Marine Cruising	Nature Observation Touring Kayaking Cultural Heritage	Anchorage Scenic and Unique features (hotspring)	Scheduled pocket Unscheduled pocket Mothership	FN Heritage Limited anchorage	Product is associated with vessels less than 100 feet.
Road Touring	Nature Observation Scenic Viewing Marine Cruising Cultural Heritage Rail Tours Lodges	Roads Scenic and unique features Reliability of fauna sightings	Circle bus tours Linkage tours	Linkage to other Districts and Agencies Road closures	Link tours join marine to rail and require regional cooperation. Hwy tours can link with river floats. Highlight on "the Hill". Gravel roads to the Big Cedar.
Destination Lodges	Saltwater/ Freshwater Fishing Nature Observation Helicopter Cultural Heritage Scenic viewing Ocean kayaking Hiking	Scenic Values Fish Suitable location	Sport fishing Spa (also FN) Wilderness Activities	Fish Suitable locations	Lodge placement expands the base from which associated products can emerge.
Hut to hut	Fishing Ocean kayaking Boating (small) Nature Observation Cultural Heritage Scenic Viewing	Scenic values Fish	Marine(boat/kayak) Lake (fly-in drop off) River (fly-in drop off) Trail (linear or circle)	Vandalism	High to low end Boaters /Kayakers
Cultural Heritage	Touring Destination Lodges Helicopter Marine Cruising Ocean kayaking Miscellaneous Nature Observation	Visible Heritage features Heritage Interpretation Heritage Exposition	Tours Interpretive Centers Destination Lodges	Sensitivity of information.	First Nations and European heritage compliment to the other products. Canneries, lighthouses and artifacts
Adventure	Windsurfing- Whitewater kayaking Exposed Ocean Kayak Mountaineering Rock Climbing Caving/Canyoning Paragliding	Cliffs Winds Glaciers, ice fields Remote, rugged ranges Open, exposed coast	Air transport Local access	Safety Unreliable weather	Bella Coola and other communities have feature groupings suited for attracting extreme sport enthusiasts (participants with advanced skill.

5.4 Community and Product Matching

Throughout this report, identified opportunities are associated with the community or communities best situated to benefit from their development. However, it lies within the purview of each community to determine whether or not they support development of particular opportunities.

Opportunities were identified and associated with communities without prejudice to treaty negotiations or First Nations' traditional territories. First Nation leaders have stated that they will not pursue opportunities outside of their traditional territory; they will defer to the Nation in whose territory the opportunity is positioned, and will work towards cooperative management in areas that they share.

The following set of tables links tourism opportunities to the communities.

Table 5.4-1: Linkages of Communities and Products

BELLA COOLA VALLEY and NUXALK	
Product	**Description**
Ocean Kayaking	Opportunity is limited by the high winds, lack of suitable campsites and steep terrain typical of fiords.
Air (Helicopter and Fixed Wing)	Inland tours. Glacier viewing. Very dramatic landscapes by Monarch Glacier.
	Coastal tours along the Dean or South Bentnick Channelwith potential to include inland tour..
Nature Observation	Grizzly viewing at the Atnarko and Kimsquit rivers.
Marine Cruising	Long fiords and great distances limit circle tours. Linear tours are linked to the outer coast communities. High potential for hotspring, First Nations interpretive circle tour to Tallheo Hotspring.
Road Touring	Highway 20 and the "Hill" provide a scenic, memorable tour opportunity. Gravel roads provide access to features adjoining the Bella Coola Valley.
Destination Lodge	Tweedsmuir Park and hotsprings provide opportunities.
Hut Systems	Trail based hut systems along grease trails and Alexander Mackenzie route. Constraints may outweigh the opportunities.
Cultural Heritage	First Nations interpretive opportunities lie with the Thorsen Creek Petroglyphs, the Tallheo Hotspring and other features best known to the Nuxalk people. The Thorsen Creek Petroglyphs offer an opportunity for cultural sharing, but one must recognize the sensitive nature of disclosing these and other artifacts to the public. Other than these, there are limited physical artifacts useable as tourism attractions and there is a concern by the First Nations of their disclosure to the public.
	European heritage is visible in Hagensborg and the adjoining valley. Tallheo Cannery depicts mdi-20th century development in the Mid-Coast.

Adventure	The steep mountains, cliffs and glaciers that surround the Bella Coola Valley offer enthusiasts opportunities for climbing, mountaineering, etc. The Nuxalk-Carrier grease trail (A. Mackenzie) offers possible opportunity for long distance mountain biking.
KLEMTU	
Product	**Description**
Ocean Kayaking	High opportunities limited by distance of suitable features from Klemtu and shortage of suitable camping areas. Heritage sites are closely linked to suitable camping areas.
Air (Helicopter and Fixed Wing)	A 60 km radius from Klemtu reaches scenic areas with a variety of topography from steep terrain and cliffs (Anchor, Ellerslie and Roderick Lakes; Fiordland) to low elevation coastal shores (West Princess Royal, Swindle and Price). Numerous small rivers, creeks and lakes suitable for fishing. Wildlife are difficult to detect and the possibility for disturbance is high.
Nature Observation	Sightings of marine mammals, Kermode bear (Princess Royal), Grizzly bear (Khutze), mountain goat (Fiordland) and other mammals are not reliable. When sighted, disturbance and habituation is a consideration and possible constraint. Khutze Hotsprings is a warm spring.
Marine Cruising	The greatest opportunities for marine tours are linked to Laredo Inlet and Kitasu Bay to the west and to Khutze and Green Inlets (outside the study area). Distances to the west are an obstacle
Road Touring	There are no road touring opportunities.
Destination Lodge	There may be a lodge opportunity in Laredo Inlet and Anchor / Canoona Lake. These areas are closely linked
Hut Systems	Marine and Lake hut system opportunities linked to Kitasu Bay and Laredo Inlet with maintenance constraints. Lake hut systems can be accessed by air with opportunities for kayaking/canoeing on site.
Cultural Heritage	The presence of the First Nations and the Kitasoo in the study area allow for interpretive opportunities, however there are limited physical artifacts useable as tourism attractions and there is a concern by the First Nations of their disclosure to the public.
	Butedale provides the visible structures suitable for the interpretation of early to mid 20th century development in the Mid-Coast.
Adventure	Circle opportunities for open water kayaking linking west Swindle and Price Islands to Klemtu.
WAGLISLA (BELLA / BELLA) and SHEARWATER/ DENNY ISLAND	
Product	**Description**
Ocean Kayaking	Numerous islands provide an opportunity for kayaking in sheltered and open waters. Limitations are linked to few beaches, fresh water sources and level camping areas. High First Nations heritage values and present use areas are associated with optimal kayaking areas.
Air (Helicopter and Fixed Wing)	A 60 km radius reaches scenic areas with a variety of topography from steep terrain and cliffs (Roscoe Inlet, Roderick Lake among others) to low elevation coastal shores. Numerous small rivers, creeks and lakes suitable for fishing.

Nature Observation	Sightings of marine mammals, Grizzly bear (Koeye), mountain goat (Roscoe, Link, and Ellerslie) and other mammals are not reliable. When sighted, disturbance and habituation is a consideration and a possible constraint. Seal haulouts and bird rookeries are primary consideration. Geographic features of interest include the outer coast, the steep fiords (Roscoe) and groves of large trees (Roscoe and ?) and lake beaches.
Marine Cruising	Circle tours opportunities to Roscoe, Troupe, the outer islands, to Koeye and the Hakaii. Linear tours to Bella Coola and points north and south.
Road Touring	There are no opportunities for a road tour.
Destination Lodge	There is presently a lodge in the highly suitable Pruth and Namu Bay (constraints for lodges are associated with First Nations heritage). Other potential areas are limited by a lack of feature groupings and heritage constraints with the possible exception of Roscoe Inlet.
Hut Systems	The marine hut system is well suited for the island groupings. The proximity of Bella Bella, the ability to locate huts away from sensitive sites, the provision of shelter in a wet region with limited camping are but some of the advantages for this product to Bella Bella and the Heiltsuk.
Cultural Heritage	The presence of the First Nations and the Heiltsuk in the study area allow for interpretive opportunities, however there are limited physical artifacts useable as tourism attractions and there is a concern by the First Nations of their disclosure to the public.. Namu and scattered lighthouses offer a link to early to mid 20th century development in the Mid Coast.
Adventure	Circle opportunities for open water kayaking from Athlone to Calvert Islands and including the Goose Group.

OCEAN FALLS

Product	**Description**
Ocean Kayaking	Limited opportunities.
Air (Helicopter and Fixed Wing)	A 60 km radius reaches scenic areas with a variety of topography from snow clad peaks, steep terrain and cliffs (Roscoe Inlet, Dean Channel) to low elevation coastal shores. Numerous small rivers, creeks and lakes suitable for fishing.
Nature Observation	Sightings of marine mammals, Grizzly bear, mountain goat (Roscoe, Link, Ellerslie) and other mammals are not reliable. When sighted, disturbance and habituation is a consideration and a possible constraint. Geographic features of interest include the steep fiords (Roscoe) and hotsprings.
Marine Cruising	Linked primarily to linear tours between Bella Bella and Bella Coola. Limited opportunities for circle tours due to the high winds and potential
Road Touring	There are no opportunities for a road tour.
Destination Lodge	A destination lodge may be linked to Ocean Falls itself. Opportunity for a Hotspring Lodge in Nascall Bay.
Hut Systems	Opportunities associated with cabins in Link Lake.
Cultural Heritage	Ocean Falls provides an opportunity to view a largely abandoned large-scale development and corresponding settlement. Alexander Mackenzie cairn is situated along Dean Channel. First Nations heritage has a focus on nearby Rosoe Inlet (reachable by land).

Adventure	Limited opportunities.
OWEEKENO, DUNCANBY AND DAWSONS LANDING	
Product	**Description**
Ocean Kayaking	Opportunities associated with the Penrose Island group, Fish Egg Inlet and a possible lake-marine circuit utilizing Elizabeth Lake.
Air (Helicopter and Fixed Wing)	A 60 km radius reaches scenic areas with a variety of topography from snow clad peaks, steep terrain and cliffs (Oweekeno Lake) to low elevation coastal shores including the long beach at Barnett Bay in Cape Caution. Numerous small rivers, creeks and lakes suitable for fishing. Wildlife are difficult to detect and the possibility for disturbance is high.
Nature Observation	Sightings of marine mammals in the outer coast and Rivers inlet are not reliable. Grey whales may be observed off Cape Caution. There may be some reliability for viewing Grizzly bear and mountain goat from the top of Rivers Inlet and Oweekeno Lake but the potential for disturbance and habituation is a consideration and a possible constraint. Geographic features of interest include the steep lake (Oweekeno) and Sheemahant hotspring.
Marine Cruising	Circle tours associated with resorts in the outer coast and islands groups as well as Cape Caution. There is an opportunity for a resort tour between the resorts. Possible Oweekeno Lake tour.
Road Touring	There are no opportunities for a road tour.
Destination Lodge	This area has many lodges and there is an opportunity for a number of those lodges to diversify their operations to include other activities. Sheemahant hotspring has limited opportunity constrained by the remoteness and poor scenic quality.
Hut Systems	Marine hut systems including a linkage through along Elizabeth Lake have potential.
Cultural Heritage	The presence of the First Nations and the Oweekeno in the study area allow for interpretive opportunities, however there are limited physical artifacts useable as tourism attractions and there is a concern by the First Nations of their disclosure to the public..
	The evidence of former canneries provide an opportunity for interpretation of early to mid 20th century development in the Mid Coast.
Adventure	Limited adventure opportunities although there is a high presence of suitable rock and tremendous cliffs in the area and the open waters suitable for advanced ocean kayaking.

5.5 Suitability Map Description

The objective of suitability mapping is to identify tourism opportunities that presently exist or have potential to be developed, taking into account the various physical, economic, social, planning and other constraints that will have a bearing on development. The primary sources of information for this assessment are:

- information from prior maps and research undertaken by the Ministry of Small Business, Tourism and Culture and the Ministry of Forests (e.g., features, suitability); and,

- input and comments from successful tourism operators and other informed sources regarding constraints and locations favourable for a specific activity or product.

The next step in the methodology is to identify, for each of the recreation products, those areas that can be classified as **low, medium** or **high** suitability for recreation. This assessment takes into account several criteria:

- general biogeoclimatic overview (alpine? subalpine? forest type?);
- presence of suitable features (glaciers, rivers, lakes, wildlife, and heritage among others);
- significance of the features (What is the quality of the features? Are there feature groupings? Are they unique? Are they truly significant to the opportunity being identified?),
- biophysical aspects (slope, aspect, steepness, amount of forest cover); and,
- the presence of supporting resources (trails, roads, huts, lodges, put in and pull out sites, etc.).

Low suitability includes all areas exhibiting the general biogeoclimatic and suitable feature attributes required for an activity or product. **Medium suitability** is defined as areas with suitable features and the biophysical features that heighten the importance of an area for a particular activity or product. **High suitability** areas are determined by where the significant features and supportive resources are.

The next step is to determine the cultural and environmental constraints and how they relate to the areas identified. For the purposes of this analysis, if the constraint was deemed to be significant enough (at the scale of the mapping) then an area may be reduced in significance or eliminated. The concerns expressed by the First Nations and small communities of the Mid Coast that operators from the outside may disenfranchise their resources are realistic but, for a large part, recreationists who would utilize them are already aware of them. To exclude these areas does not address the issue. What needs to be done is for the local communities to be aware of their resources in the hope that they will benefit. For this process, their concerns are addressed in the report and on the maps, and operators are asked to work with the local proponents so as not to alienate local communities.

6 PRODUCT ASSESSMENT

6.1 Introduction

Section 5 of this report provides our rationale for product selection, and defines the various geographic units to be evaluated. Nine products have been identified for further resource, economic and market evaluation. These products can be regarded as the best *short-term* options for outdoor recreation-based tourism products. None of the products exist in isolation, however, and a key objective of the analysis is to identify the linkage between each.

In this section, each of the tourism products will be evaluated using resource criteria in order to identify the geographic units exhibiting the highest potential. Having done this, each geographic unit will then be assessed by market, economic and social criteria. By evaluating the units within the context of these additional constraints, we can narrow down the scope and more precisely identify the specific areas, or *polygons*, which exhibit the greatest potential. Those areas that are filtered out should be regarded as those with longer-term opportunities. In narrowing down the choice to those most likely to be developed, the consultants are not suggesting that the others do not have merit, simply that they may only be feasible on a longer-term basis.

The reader should note that not all products are relevant to all units. For example, ocean kayaking is evaluated only for the Outer Coast, Fiords and Lakes, and Princess Royal Island geographic units. Conversely, road touring is evaluated only for the inner Mid Coast (Mountains and Trade Routes unit).

We note here that Culture Heritage will be treated in a somewhat different manner than the other products. While the project Advisory Committee has indicated that culture and heritage is an important tourism feature on the Mid Coast, the decision about how to develop specific First Nations cultural and heritage features into tourism products lies entirely within the domain of the First Nations communities. Some First Nations participants in the Tourism Opportunity Strategy process have indicated that it is not in their best interests to fully disclose the location of their cultural, traditional and/or sacred sites. Others have voiced the need to plan and control the rate of tourism development in their territorial lands. There is a general recognition that tourism will provide communities with a powerful tool for fostering local economic diversification, but that the local communities must be positioned to develop tourism at their own speed, on their own terms. The Ministry of Small Business, Tourism and Culture fully concurs, and makes the good point that this project is not necessarily intended to be an exhaustive inventory of tourism features.

In light of these very real concerns about First Nations tourism development, we have taken the approach of mapping and narrowing down the highest potential polygons for all products *except* Culture Heritage. However, for each product, we identify the key cultural or heritage links that would enhance its development. The decision to develop any of the products, or to make the link with culture or heritage features, will lie with the proponents who choose to build the Mid Coast tourism sector.

Our overall approach to evaluation begins with an analysis of the resource, incorporates the socio-economic considerations, and culminates in a description of the polygons with the greatest potential. The evaluation criteria is as follows.

Table 6.1-1: Description of Product Analysis Criteria

Resource Criteria	
Uniqueness of Key Features	Identifies level of uniqueness from the target market. The implication is that the setting and key feature will attract those tourists/recreationists from those areas where the product is not available.
Supportive Resources	Rates the availability of features integral to the viability of a product, i.e. ocean kayaking generally requires freshwater and sheltered landing.
Existence of Supportive Infrastructure	Rates the current availability of infrastructures integral to the viability of the product, i.e. snowmobiling requires trails or logging roads
Associated Products	Identifies the products that enhance the opportunities of the product described.
Significance of Associated Products	Rates the significance of the associated products.
Access to Staging Area	Analyzes the accessibility of the related staging area to the markets
Access from Staging Area to Resource	Determines the accessibility for the product described to travel from the staging areas to the optimal resources. Enhanced access such as shuttling is not a factor.
Culture Heritage Features	An indication of the presence of First Nations and Post-contact Cultural and Historical artifacts including petroglyphs, totems, canneries, village sites and other man made evidence of habitation and land use.
Prime Season	Is the optimal season. There are opportunities related to the shoulder seasons.
RESOURCE DISCUSSION	General discussion on the products as they relate to the unit.
COMMUNITIES MOST ABLE TO BENEFIT	These communities lie within or close to the unit discussed.
Market, Economic and Social Criteria	
Level of Competition	Evaluates similar products at the local, regional, provincial and/or international levels
Market Demand Potential	Potential for future demand growth.
Impact/Conflict	Existing Recreation Use Other Land Uses Community Use or Plans Environmental
Local Employment Impacts	
Regulatory or Crown Tenure Requirements	Key government regulatory processes in achieving development of the opportunity
Level of Community Support	
Infrastructure Requirements	Physical infrastructure needed for development (e.g., roads, communications, etc.)
General Capital Requirements	
POLYGONS EXHIBITING HIGHEST POTENTIAL WITHIN EACH UNIT	Identifies the POLYGONS WITH THE GREATEST POTENTIAL that fall within each unit.

6.2 Culture Heritage

6.2.1 Resource Assessment

Discussion

The stretch of coast between the northern tip of Vancouver Island and the southern end of the Haida Gwaii, is protected from the battery of the Pacific by an almost unbroken chain of small islands. The history of the Mid Coast comes alive as one gazes upon the ancient temperate rainforests and cruises in and out of a maze of waterways. One can almost see the ancient villages scattered on the distant shores. First Nations people have occupied and utilized this area for over ten thousand years, catching and preserving salmon, eulochon and other important food resources in the summer and socializing, potlaching, and feasting in the winter. Although hunters and gatherers like the tribes of the Interior, the coastal natives were able to establish permanent villages due to their abundant food supply. Their complex cultures were distinguished by an emphasis on wealth, a refined artistic tradition, and a rich spirit life. Travel along the coast was accomplished by dugout canoes that could be impressive in their length. A visit to this area cannot be possible without observing the powerful presence of the Heiltsuk, Oweekeno, Nuxalk, and Kitasoo peoples. Over time, Europeans arrived to explore, to trade in furs, to utilize the natural resources and to settle. Evidence of their history is apparent in a number of locations and their presence is very much a part of the cultural landscape of the Mid-Coast.

Table 6.2-1: Regional SWOT Summary for Heritage/Culture

Strengths	Quality of cultural resources, very high marketability, existing capacity for further cultural interpretation, low impact, non-consumptive activity.
Weaknesses	Although each culture is unique there is a repeatability of similar products along the BC coast, lack of artifacts and other visible evidence of culture and heritage to outsiders, level of support facilities and services; competition from elsewhere in the province
Opportunities	Education and interpretive tours, linkages to other products, infrastructure development.
Threats	Conflicting land uses

A Brief History

The traditional territories occupied by the **Heiltsuk** First Nation or Bella Bella people include the region adjoining Fitz Hugh Sound and section of the Burke and Dean channels. The occupation of this area dates back over 10,000 years. Their language is Oowekyala- Heiltsuk, which is related to Kwakiutl and Haisla (all are part of the Northern Wakashan language group). In the past, they migrated seasonally to where they could harvest the abundant supplies of fish, shellfish and sea mammals. During the winter months they resided in semi-permanent villages, occupying their time by potlatching and holding ceremonies conducted by the intricate dancing societies. Outsiders prized the canoes, boxes and utensils that the Heiltsuk produced. Society was divided into chiefs, commoners and slaves (who were mainly war captives). Like the majority of the First Nations on the Mid Coast, known contact first came with the Spanish explorers who plied the coast in the late 1700's. In 1793, the Alexander Mackenzie expedition and the Captain Vancouver expedition brought contact with the British. Mackenzie was trying to find a land route to the Pacific from the east and Vancouver was conducting a survey of the coast. At the turn of the 19th century, the Heiltsuk became heavily involved in the Sea Otter trade and subsequently with the establishment of Fort McLoughlin on Campbell Island in 1833, intermediaries in the Fur Trade. The population of the Heiltsuk was at that time estimated at 1600 but the diseases that ravaged the majority of First Nations in the mid 1800's reduced their numbers to 204 and the five original tribes merged and settled at Bella Bella in 1890. The presence of Methodist missionaries and a trading post made the site attractive. Sometime in the 1890's the village moved to nearby Waglisla, where it still remains.

The **Kitasoo** / Xai'xais people reside at Klemtu, on the east side of Swindle Island. There are two languages, Tsimshian and Kwa'kwala. Klemtu was founded in 1870 by Tsimshian and HaisHais (Heiltsuk) families in order to take advantage of the increasing steamer trade through the Inside Passage. Steamers passing through Finlayson channel that needed wood and supplies stopped at Klemtu. Before it was called Klemtu in 1902, it was China Hat. A salmon cannery operated between 1927 and 1968.

The **Oweekeno** occupied the area around Rivers Inlet and Oweekeno Lake and its drainage. Archaeological evidence dates back 9,000 years in the area and the Oweekeno people are thought to have once had the largest population of all Mid Coast nations. They speak Oowekyala, similar to the Heiltsuk First Nations, they are also part of the Northern Wakashan language group. Unlike other coastal groups, the Oweekeno based their seasonal subsistence patterns on inland resources, although they did visit sites on the outer coast. Their society consisted of chiefs, commoners and slaves. By the end of the 19th century, canning and logging centralized the settlement of the Oweekeno village, called Katit, on the Wannock River at the head of Rivers Inlet. As a result of the areas high salmon migratory path to freshwater and proximity to the market it became a major canning operation, with over fourteen canneries opening up and employing the Oweekeno people. However, the last of the canneries closed in the 1950's and with today's sockeye stocks critically low and on the endangered list, the Oweekeno are struggling with unemployment and trying to find a new primary source for their local economy.

The **Nuxalk** First Nations traditionally occupied several permanent villages along the upper Dean Channel and the north and south Bentinck arms of the Burke Channel and up the Bella Coola River valley. They are part of the Salishan Language group The area was so abundant in salmon and eulochon, plus herring and sea mammals and they didn't have to move around throughout the year as other groups did. Even mountain goat was used to provide meat, fat and wool for blankets. The Nuxalk culture was embedded in ceremonialism and was dominated by two secret societies. Despite the language barriers to the Heiltsuk and Oweekeno, who lived on two sides, much participation occurred in each other's winter ceremonies.

The Nuxalk and Carrier people established well worn Eulachon grease trails (BC's first trade routes) through the rainforests and up and down steep passes to the open country of the interior. When Alexander Mackenzie arrived with his expedition in 1793 in search of a passage to the Pacific, they utilized the Nuxalk-Carrier grease trail. The Hudson's Bay Company traded in this area from 1862 until 1882. In 1883, missionaries arrived and began to transform traditional customs. Contact with Europeans and the ensuing epidemics reduced the native population. The epidemics which coincided with early European contact, reduced the native population to the point where relocation to a central village was preferred, and eventually they amalgamated into one village. This village is located at the mouth of the Bella Coola River.

Around the same time, on October 31, 1894, Reverend Christian Saugstad arrived with 120 **Norwegian settlers** from Minnesota and settled on agricultural land grants east of the Reserve and began to cultivate the land. The chronicles of the Norwegian settlement are detailed in letters and diaries which have been preserved to this day, as well as in 'Nybyggeren', a hand-written newsletter which was published monthly and brought from log cabin to log cabin. These early records tell of hardship in clearing land with tree trunks as big as a house, of how the Norwegians came to rely on native Indians for help, transportation and advice on living off the land, and of close encounters with local wildlife. The Norwegian settlement marked the transformation of the Valley economy from one based on trade (in eulochon grease and, later, furs) to one linked to the national monetary system.

By the end of the 19th century the commercial fishing industry became extremely important and wage earning began to replace the subsistence economy in the entire region. Along with the boom of canneries in Rivers Inlet and Oweekeno was the emergence of canneries along the outer coast. Historical points of interest include an old salmon cannery settlement known as East Bella Bella, located across Waglisla, on Denny Island. Namu is another old cannery located at a traditional Heiltsuk village. Canneries provided employment to many First Nations who at one time comprised 90 percent of the commercial salmon fishery in BC. In 1884 they were denied commercial access to the fisheries resource.

After decades of institutional and cultural degradation there is a resurgence of traditional singing, dancing, arts and oral traditions. Sites such as the petroglyphs of Thorsen Creek in Bella Coola have spawned a physical link to the cultural renaissance. There are tremendous opportunities to bind the First Nations cultural renaissance with tourism, and to expose visitors to the region to the richness that is the First Nations Culture.

Culture and Heritage: Features

The Mid Coast is rich in opportunities associated with the exposition and interpretation of its special culture and heritage. Heritage and cultural viewing are low impact, non-consumptive activities often associated with ecotourism. Cultural and Heritage viewing is increasingly becoming a primary activity in tourism. The two sub-products in this region are the First Nations and Post Contact (non-aboriginal).

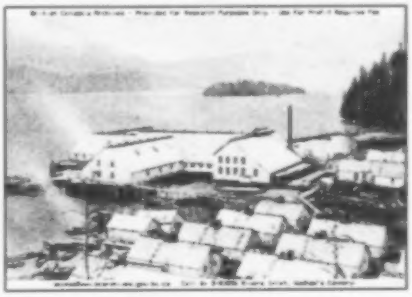
First Nations

Most of the "ancient" cultural infrastructures, such as traditional longhouses and totems, have long disappeared. Built of wood the structures were easy victims to the harsh climate and invasive vegetation. *In this section only the most significant existing features are identified. The identification of the more specific First Nations cultural and heritage features lies entirely within the domain of the First Nations communities.*

- **Petroglyphs and Pictographs**: There are a number of petroglyphs and pictographs on the Mid Coast. The best known is the *Thorsen Creek petroglyphs*, a large petroglyph site, with more than 100 Indian rock paintings located located eight kilometres west of Bella Coola. The incised rock symbols on the canyon face resemble the Polynesian stone carvings on Easter Island.
- **Ancient habitation:** *Namu* has been declared the oldest archeological site on this section of the coast.
- **Culturally Modified Trees** are evident in the forests. These are not difficult to recognize.
- **Trade Routes** The *Nuxalk -Carrier Grease Trail* (Alexander Mackenzie Heritage Trail): Before European contact great quantities of eulachon grease were carried inland from the coast on this trail as trade items. Alexander Mackenzie used the trail to reach the coast.

Post Contact

- **Alexander Mackenzie Park** and a 420 km hiking trail commemorate Mackenzie's historic trip of being the first person to traverse the North American continent.



Canneries: There are few canneries still evident along the west coast. At the confluence of the Burke Channel and Fitz Hugh Sound is an abandoned cannery called *Namu*, meaning *place of high winds*, or whirlwind. Established in 1893 as a fish-processing plant and cannery, a fire levelled the community in the 1960s. The cannery was subsequently rebuilt and operations continued until the late 1980s, when high transportation costs and low fish prices forced the plant to close. You can still see structures built on wharves over the water, interconnected by boardwalk. A short trail leads to nearby Namu Lake, which has long expanses of sandy beaches and good fishing.

- **Abandoned Communities:** Located at the head of Cousins Inlet off Dean Channel, is the remote coastal community of *Ocean Falls*. Once a flourishing pulp mill town until closure of the mill by Pacific Mills in 1981. The town of Ocean Falls is virtually abandoned, and remains scarcely inhabited today.
- **Remnants of Norwegian Community:** The Norwegians were fine homebuilders. The Bella Coola Museum is housed in such a historical structure and offers a glimpse into the lives of these

settlers. There is also a heritage Norwegian house in Hagensborg. Tours of the museum and heritage house are offered to visitors during the summer months.

- **Lighthouses** include the manned lighthouses of Boat Bluff, Mcinnes Island, Ivory Island, Dryad Point, Addenbroke (built in 1914). All are scenic structures that appear to defy the ruggedness of the coast.
- **Highway 20 ("The Hill"):** Prior to 1953, the only way to or from Bella Coola was via a steep packhorse trail that led to Anahim Lake, and the start of Highway 26. In August 1953, the residents of Bella Coola celebrated a newfound and well-deserved freedom. For two long years they had donated their time, energy, equipment and money to develop the last portion of Highway 20 - the stretch of road has had a significant impact on the prosperity of Bella Coola.
- **Airport:** As with Highway 20, in the 1970s the local residents built their own airstrip, resolving not to wait for government support.

6.2.2 *Market, Economic and Social Assessment of Heritage / Culture*

Competition

From our extensive work throughout British Columbia we have seen rapidly growing recognition of history and culture - both native and non-native -- as important tourism attractions. Many communities on the coast are now looking to their history and cultural traditions as ways to attract visitors, complement other tourism products, and foster economic diversification. Just a few examples include the following:

- restoration of the North Pacific Cannery in Port Edwards - this has achieved status as a national heritage site;
- tours of ancient Tsimshian village at Pike Island;
- cultural tours and native dance at Klemtu;
- revival of the E&N railway on Vancouver Island;
- restored mining community of Barkerville;
- festival dancing on Vancouver Island.

There are many more heritage or culture-based tourism initiatives throughout the province.

First Nation communities on the Mid Coast are either actively developing specific cultural tourism or are in the process of planning or evaluating specific cultural products for future development. For example,

- the Heiltsuk community in Bella Bella is planning and carrying out a feasibility assessment of a hotel and big house at McLoughlin Bay as major tourism attraction; and,
- the Kitasoo have developed a tourism strategy, and are now planning the development of an ocean kayaking business.

Market Assessment

With the growth of the global ecotourism industry, there are more travellers seeking out new, enriching experiences as part of their holiday or travel plans. This is a departure away from the "old" vacation mindset of hedonism and consumption, and towards authenticity and education. "Ethnotourism" is booming worldwide, with more and more tourists seeking out cultural experiences in Africa, Australia, Asia-Pacific and North America. The benefits to aboriginal people is highly variable, however. In those communities where the aboriginal people have ownership and control over the delivery of the product, the revenues are significant and accrued entirely at the local level. But there are also many examples of indigenous culture being exploited as a tourism product, and where few benefits are realized by the aboriginal people in question - one such example is described in an article on the bushmen of South Africa in the February 2001 issue of *National Geographic*. Ownership and control of the product are key determinants of the success and sustainability of any culture-based tourism product.

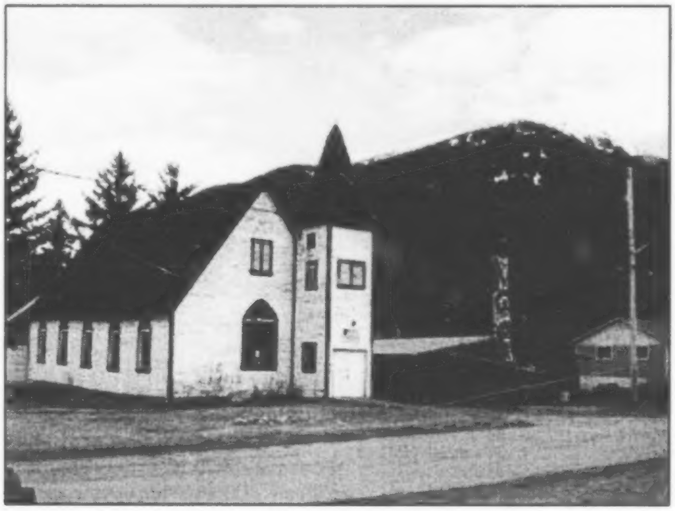
A recent study of the European long-haul pleasure market shows that Germany, the UK and Italy have the largest potential for aboriginal cultural products. Altogether these three countries represent a total market size of 8.3 million aboriginal culture travellers to Canada over the next five years. While Germany has the highest number of visitors attracted to aboriginal tourism, a relatively small percent of the market (28 percent) indicates interest in visiting Canada during the next five years. Italy is a better prospect, accounting for 3.1 million potential travellers, while the US and Germany account for 2.7 and 2.5 million respectively.

A survey done on First Nation tourism in Canada identified BC as the destination with the best-perceived aboriginal cultural product to offer. On the Mid Coast, First Nations make up over half of the local population and the region's First Nation communities have maintained a strong cultural identity. Language, philosophy, religion, customs, ceremonies, traditions, arts, crafts, dance, music, sites, artifacts, and values are all reflections of culture which can be an important component of the culture based tourism product.

First Nation's culture as part of the tourism experience is popular among visitors to BC, particularly among European visitors. **Table 6.2-2** outlines the visitor participation rates in First Nations cultural sites identified in a 1996 survey of BC tourists.

Table 6.2-2: BC 1996 Visitor Survey: Cultural Visit		
	Number of Total Visitors	**Participation in Visit to First Nations Cultural Site**
Long Haul US (California/Hawaii, Mountain States, Central & Eastern States, and Mexico)	1,958,000	34%
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	3,615,000	20%
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT, Yukon)	3,706,000	18%
Long Haul Canada (Rest of Canada)	1,196,000	25%
• **Europe**	535,000	43%
Asia/Pacific	828,000	31%

Source: Tourism British Columbia



Bella Coola: photo by Warren Fox

6.3 Ocean Kayaking

6.3.1 Resource Assessment

Discussion

Ocean kayaking is a mode of transport that allows participants to view the marine-terrestrial interface at a more leisurely pace than via motorized transport. Participants can also become intimate with the shallow coves and rocky coastlines not accessible through other modes of transport. This activity can be supported through the use of huts, motherships, or shuttling. Linkages include bird watching, whale watching and other wildlife viewing, camping, hiking, swimming and beach activities, fishing and specific interest tours (hotsprings, cultural, circuit).

The potential settings range from front country to remote wilderness. Amenities may range from the rustic to full service, while the duration of an excursion may vary from half a day to 2 weeks. Kayakers range in abilities from participants who lean towards soft adventure, are likely to be novices and thus require a supportive environment to the enthusiast that prefers more challenging and adventurous trips. Guided day excursions are less taxing and therefore more suited to a broader range of participants.

Kayaking can play an important supporting role for destination lodge resorts. Education and interpretation are important elements of this activity, therefore skilled and knowledgeable guides are an asset.

Table 6.3-1: Regional SWOT Analysis for Ocean Kayaking

Strength	Remoteness, scenery, high value features, access, heritage and cultural features, historic and current First Nations presence, growing demand, community support, low startup capital requirements
Weakness	Repeatability of feature along coast, high precipitation, rapidly changing weather and sea conditions, extreme tides, limited camping and freshwater, relatively short "season", insects, Commercial Recreation Tenure uncertainties, uncertainty of land claims and traditional use sites, evidence of historic resource degradation, poor presentation of culture and related features, cost to access region, transportation scheduling
Opportunity	Links with a mothership, hut-to-hut, circuit routes, shuttling, educational, interpretive, overland (hiking, freshwater linkages to marine, leeward to windward side), resort and joint ventures with First Nations.
Threats	Increased use affecting "remote" experience, forest harvesting (visual), user safety preparedness, human waste management, conflicting site uses, competition for limited campsite options, user impact on sites.

The Mid Coast and Ocean Kayaking

Ocean kayak tourists to the Mid Coast have high expectations for remoteness, naturalness, wildlife sightings and adventure. The Mid Coast with its many islands and miles of coastline is well suited to exploration by kayak. A variety of experiences can be found from the steep fiords in Fiordland to the archipelagos that extend from Klemtu to Hakaii Provincial Park, to the varied coastline that continues to the open water of Cape Caution. The natural and cultural surrounding allows for a link to education and interpretive opportunities. The Mid Coast provides an accessible opportunity, as a number of the communities are within easy reach of the optimum recreation features.

The rich culture and heritage values contribute to the ocean kayaking product. The First Nations people of the Heiltsuk and Kitasoo have historically derived their sustenance from the land and the rich marine resources. The richness of the region allowed time for arts and ritual. The First Nations continued presence and the subtle, historical evidence of their past heightens the feeling of mystery and wonder for the paddler in the outer Mid Coast. Evidence of later migrations of people who arrived to exploit and process the natural resources can be seen in abandoned canneries, settlements and timber harvesting.

A weakness of the Mid Coast is the shortage of suitable camp sites, the extreme tides, insects at certain times of the year, the inclement weather, as well as the cost of travel and transport scheduling. Linkages to the hut-system and mothership product will offset these weaknesses.

Ocean kayak tourism in the region has traditionally been associated with guided expeditions but as the number of visitors grows there is an increase in the numbers of self-guided excursions. The Discovery Passage ferry service to communities scattered along the coast provides an increased number of staging areas. There are implications to this:

- Displacement of kayakers from the south coast to more remote areas applies pressure on the Mid Coast.
- The attractions, increasing access, the availability of rentals and development of supportive infrastructure such as huts has a tendency to draw individuals with lower kayaking and general outdoor skills. The actual distances to significant and supportive features, degree of exposure to marine and weather elements, and distances from local staging areas are a cause of concern.
- Increased disturbance on the cultural and natural attributes in the area, including spoiling of clam beaches, disturbance of seal haul outs and bird rookeries and sensitive First Nations heritage sites.

To ensure the desired experience is not compromised through increased use, "limits of acceptable change" or carrying capacity prescriptions should be established for the type of setting desired. This may result in limiting use in certain areas while designating others as high use. The appropriate infrastructure (such as toilets, signage, shelters) should be developed according to the management criteria. "Leave no trace" standards must be enforced. Sensitive clam beds and rules surrounding waste must be clearly identified. The impact of a hut system development and mothership on the feeling of remoteness should also be assessed before opportunities are pursued in those areas.

Optimum Locations

The island grouping of the outer coast provides excellent opportunities for a variety of ocean kayaking visual and experiential adventures. The numerous islands provide access to the open coast from sheltered coves, however a kayaker must be prepared for outer coastal conditions including the strong winds of Queens Sound.

Pocket and large beaches can be reached. The limitations are the lack of water and the shortage of level camping ground. The optimum areas include the following.

- Higgins Pass and Kitasu Bay on west Swindle and northern Price Islands. The distance to reach this area from the nearest community, Klemtu, is great and shuttling is recommended. Land and open waters separate Higgins Pass from Kitasu Bay. A portage may be developed to link the areas.
- The vicinity of Bella Bella is a high opportunity area due to the optimal recreation resources in relatively close proximity to Bella Bella. Features include island groupings, inlets, bays, beaches, open and sheltered waters. Particular emphasis is on Athlone, Dufferin, Horsefall, Campbell Island and the pass between Cunningham and Chatfield Island (and the access to Webster Lake). Access would be by shuttle or direct departures from Bella Bella.
- Hakaii, the west side of Hunter Island contains island groupings such as the McNaughton Group, the Spider/Triquet island groupings and the distant Goose Islands. These are accessible from Pruth Bay and Bella Bella. The McNaughton Group can be reached from the relative calm of Hunter Channel.
- Namu to Dawsons Landing along Fitz Hugh Sound contains a number of bays in which to shelter. There is a possibility of an expeditionary circle route from Fish Egg to Elizabeth Lake with a portage to Hardy Inlet to Rivers Inlet and Dawsons Landing.
- Ellerslie Lake is a large lake readily accessed from the coast. Its features include sheer cliffs, beaches and high heritage values.
- Roscoe Inlet provides opportunities for heritage/nature interpretation with links to sites and big trees.
- Princess Royal Island is internationally recognized for the Kermode bear and has high expeditionary potential that is related to crossing from the east along scenic Anchor and Canoona Lakes to the west including Deer and Cougar Lakes and the west coast (via Surf Inlet). This can be achieved as a single portage.

6.3.2 Market, Economic and Social Assessment of Ocean Kayaking

Competition

As interest in kayaking grows worldwide, so do the number of businesses that specialize in guided kayaking tours, as well as kayak sales, rentals and instruction. In 1989, there were 15 ocean kayaking companies on the west coast of BC. In 2000, this number was approximately 250 companies, although about 100 were very small, or considered a secondary operation by the owners whose primary activity is another tourism business. These secondary ocean kayaking operators typically do not advertise their products. Of the remaining 150 operators, approximately 30 to 40 were larger ocean kayaking companies.

A review of the SEE Kayak directory on the internet in January 2001 shows that over 50 kayaking tour companies are registered on the west coast of North America. Approximately half of these are BC-based, or offer tours of the BC coast. Those that offer tours on the Mid Coast include:

- Northern Lights Expeditions (based in Bellingham);
- Discovery Expeditions (tours include Princess Royal Island); and,

- Explore Charters (uses an 80 foot mothership as base for kayaks and zodiacs).

Only a small proportion of BC kayak touring companies are registered in the SEE Kayak directory, generally the larger operators.

On the Mid Coast, there are few kayaking businesses. It is our understanding that one kayaking guide is seasonally employed out of Bella Coola and that, until last year, there was a rental operation at Shearwater Marina, which has since gone out of business. Another operator in Bella Bella offers shuttle services to kayakers that want to travel to the more remote islands. Kayakers who want to explore the Mid Coast generally have two options:

- Independent kayakers can bring their own kayaks or rent them on North Vancouver Island, then travel to the Mid Coast on the Queen of Chilliwack, which provides a drop off service. There are a number of kayak rental shops on North Vancouver Island, including Comox Valley Kayaks Ltd. (with three Vancouver Island locations), and North Island Canoe and Kayak Rentals.
- Participate in a guided tour, generally starting out on North Vancouver Island, or from a mothership. The guided kayaking expeditions offer short or multiple-day tours, and a range of amenities such as interpretive guiding, fine food, solar showers, tents, and specialized safety features. Explore Charters provides accommodation on a large mothership. In all cases, they provide full services in arranging for equipment, transportation and accommodation, thereby minimizing the hassle and effort required to gear up for the trip.

It should be noted that a number of sportsfishing lodges on the BC coast have also started to offer kayaking as a secondary activity for their visitors.

In order to capitalize on the growing demand for ocean kayaking experiences, the Mid Coast needs to build up its infrastructure and knowledge in this sector. There is a critical mass of kayakers to the Mid Cast each season, but almost all of them are compelled to obtain their equipment before they arrive. By providing kayaking services right on the Mid Coast, and effectively marketing them, entrepreneurs can capture a share of this market. The key is to take the questions and mystery out of the reservation/rental process by making it as seamless as possible.

Market Demand

Ocean kayaking has great appeal to recreationists who prefer non-motorized and direct physical contact with nature. It is carried out along the shorelines of the ocean or lakes, providing access to coves and rocky coasts that cannot otherwise be reached. Depending on the conditions and distance to be travelled, the required fitness level varies from beginners, or those with a relatively low fitness level, to experienced kayakers with a high level of fitness. Generally, kayaking has the strongest appeal for recreationists between the ages of 30 and 55.

Ocean kayaking is strongly linked to nature observation, and can play a secondary role as part of other travel experiences that involve wilderness activities (e.g., sportsfishing). It can be carried out independently, or as part of a guided tour. The trips can range from a few hours to several days. For overnight trips, accommodations can vary, ranging from tents and rustic cabins, to well-appointed mother ships or resort lodges.

Ocean kayaking is a fast-growing sport worldwide. A survey in the US in 1994/95 estimated that 2.6 million Americans participated in kayaking that year, both whitewater and ocean kayaking. Canada and the US have been identified as the top global destination for this sport, and the demand for ocean kayaking has increased dramatically over the past decade for a number of reasons:

- growth in the demand for wilderness experiences and soft adventure;
- the relative ease of learning the fundamentals of kayaking;
- the sport's growing profile worldwide;
- easier access to safe and appropriate equipment and instruction, whether renting or buying; and,
- its availability as a secondary sport at many other recreational operations - e.g., hotels, sportsfishing lodges, resort destinations, marinas.

One indicator of the popularity of kayaking in North America is the demand for publications that feature the sport. A review of the internet shows that there are at least five publications dedicated to kayaking and canoeing. One of these - *Canoe and Kayak Magazine* - has approximately 500,000 subscribers, primarily in North America.

North America is the dominant market for kayaking, although guided kayak tours are available all over the world. BC is the most popular area for ocean kayaking in Canada, and a significant proportion of its participants are residents of BC.

The number of kayakers - both independent and those on guided tours -- is growing on the Mid Coast. This can be ascribed largely to the Discovery Passage ferry, which provides kayak drop off or pick up at any point on its route, and to the popularity of a number of guided kayaking operations that offer tours on the Mid Coast.

The drop off service offered by BC Ferries is highly appealing to independent kayakers. Most rent their equipment and buy their supplies on North Vancouver Island and, once dropped off, can spend several days kayaking the Mid Coast independently. However, the numbers are not yet large. BC Ferries data shows that the number of kayaks and canoes transported on the Discovery Coast ferry ranged from 108 in fiscal year 1998/99, to 69 in fiscal year 2000/01. They generally favour the Hakai recreation area, Hunter Channel and Goose Island. Several use the services of a local tourism operator in Bella Bella to shuttle their kayaks to the more distant islands and beaches.

There are a small number of operators who also offer guided kayaking tours in the project area. One of the largest operators indicates that they bring in about 400 clients per year, primarily from the US.

Some kayakers have indicated that the popular "traditional" kayaking destinations, such as the southern Gulf Islands and Vancouver Island, are becoming relatively crowded and that this is pushing kayakers further north to the Mid and North Coasts. This trend poses a problem on the rocky Mid Coast, where there are a relatively small number of suitable beaches and campsites. Kayakers are required to paddle longer distances to find good landing sites and, in the case of less experienced kayakers, this raises questions regarding safety.

Land Use Impacts and Issues for Kayaking

Existing Recreation Uses

Ocean kayaking is already a widespread sport on the Mid Coast. It is generally compatible with all other tourism and recreation activities, both current and planned. Kayakers are drawn to the experience of being alone in the wilderness, and they generally avoid other kayakers, or marine traffic. Given the limited number of suitable beaches and flat camp sites, a significant increase in the number of kayakers on the Mid Coast could mean more competition for these sites. With beach sites at a premium, tour operators may need to consider building infrastructure such as ramps or platforms at rocky sites in order to increase landing and camping opportunities.

Clearly, it will be important to know what the acceptable carrying capacity is for the Mid Coast.

Other Land Uses

While in and of itself ocean kayaking is one of the most "gentle" land uses, there are two key areas where it may conflict with other land uses - First Nations traditional use, and forestry use.

As indicated above, the rocky Mid Coast has a limited number of suitable beaches and camp sites that would suit kayakers for overnight stays. Not surprisingly, these same sites have been used extensively by the First Nation communities for thousands of years. Thus, many of the landing sites are also valuable midden and traditional use sites, but many recreational users do not know or regard this. For example, kayakers frequently land at and soil clam beds belonging to the Heiltsuk. There is growing concern and frustration on the part of First Nations people concerning recreational use of their land - these relate to economic considerations such as the lack of employment opportunities locally, and the lack of respect and understanding shown for their important culture sites.

Visual quality is also a critical consideration for the ocean kayaking experience. Harvesting carried out within view of the shoreline or at overnight usage areas must be planned to preserve the sight lines, or shoreline recreational use will be negatively affected. Good communication between forestry operators and tourism/recreation interests will be necessary to minimize problems of this nature.

Community Use or Planning

The development of a Mid Coast-based kayaking industry will generate economic benefits for the local communities, if the communities are involved in all aspects of the business. The communities of the Mid Coast are presently exploring ocean kayaking opportunities as one way of diversifying their local economies, however the development of ocean kayaking ventures by outside interests will not be well received if they do not work with the local communities, and meet their community objectives.

Local Employment Impact

Employment impacts would be low and seasonal in nature, however all employment will be realized locally. Potential employment would be primarily in rentals and operations, guiding, marketing and possible boat shuttle operations. Guides should be trained in interpreting historical, natural and cultural features.

Regulatory or Crown Tenure Requirements

Use of Crown land by sea kayaking guides and others is regulated by the commercial recreation policy. Operators are required to obtain tenure under this policy.

The kayaking tour industry has established accreditation for guides and standards of practice. Presently, none of these are legally required, however clients, insurers and the travel industry are coming to expect higher standards, and will increasingly expect accreditation.

Level of Community Support

Locally-based businesses like kayaking tours are generally a good fit with the economic development goals of all the Mid Coast communities. Although each community is at a different stage in formulating their respective economic development or tourism strategies, this appears to be the product accepted by all as having positive potential and impacts. However, a venture initiated by a non-Mid Coast entrepreneur would not receive local support, unless there are solid economic links to and partnerships with the community. To garner community support for a new kayaking venture, the proponent must demonstrate that most of the benefits would accrue to locals, and that cultural or traditional sites are protected. Representatives of most of the communities have indicated that they can accept a new tourism initiative on their land if they are in control of the resource.

Infrastructure Requirements

The activity of kayaking requires little physical infrastructure other than sandy beaches for access to and egress from the water, and some camping sites. Kayaks -- and related gear such as safety vests, safety beacons, paddles, flotation devices and possibly camping equipment -- are the principle acquisitions required in order to start a kayaking venture. Shuttle boats that can transport kayaks from the staging area to distant beaches and islands may also be required, depending on the location of the operation.

Supporting transportation and accommodation infrastructure may also be required in some communities to enable the development of a Mid Coast-based kayaking industry. Ocean kayakers may draw on local accommodation if a staging area is out of a community, however the accommodation needs to meet a certain standard, and visitors need to know where it is and how to reserve before they arrive on the Mid Coast. It would be most effective to market accommodation in the staging community as part of a tour package.

General Capital Requirements

The average gross profit per ocean kayaking operator was $36,600 in 1993 with an average gross margin of 30.7 percent. Given the low inflation rate through the latter half of the 1990s, this value has probably not changed significantly. Typically a small to moderate initial investment is required for an ocean kayaking venture. The small capital start-up typically allows the operator several avenues for start-up financing.

Another "investment" required for starting a kayaking venture is that of time, in exploring the area for suitable landing sites. For an outsider unfamiliar with the area this can be a time-consuming and expensive task - locals have a distinct advantage because of their knowledge of the area.

Table 6.3-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Ocean Kayaking Product have been identified as *polygons* on the map and are described in Table 6.3-3.

Table 6.3-2: PRODUCT ANALYSIS TABLE: OCEAN KAYAKING

Unit Name /Number		Outer Coast (1)	Fiords & Lakes(2)	Princess Royal Island (6)
		Resource Criteria		
Uniqueness of Key Features	Setting	High	High	High
	Geography	High	High	High
	Wildlife	Medium	Medium	High (Kermode Bears)
Supportive Resources	Shelter (bays,coves)	High	Medium	Medium
	Level / water	Low / Low	Low -Medium / Medium	Medium / Medium
	Island groupings	High	Low	Low-Medium
	Opt. current/winds	Medium	Medium	Low
Existence of Supportive Infrastructure		Low	Low	Low
Associated Products		Marine Tours, Trail Based Activities, Cultural Observation, Nature Observation, Water Activities		
Significance of Associated Products		High	High	High
Access to Sub Unit Area		High	High	Low
Access from Staging Area to Resource		High	Medium	Low-Medium
Culture Heritage Features		Petroglyphs, village sites, midden sites, canneries	Petroglyphs, villages sites	Petroglyphs, villages sites, canneries
Prime Season		Summer	Summer	Summer
RESOURCE DISCUSSION		- The key opportunities are located close to communities serviced by BC Ferries. - Key features are abundant and presently uncrowded - There is a need for supportive services (shuttling, mothership, infrastructure development / maintenance, trail development) to enhance resource access and use. - Cultural values are high. First Nations interpretation. - Safety and site degradation must be addressed.	- Scenic and cultural values are high. - Fiord like geography limits suitable areas for camping. - Difficulty resulting from high seas resulting from winds and tides within the fiords.	- Internationally recognized for the Kermode bear. - High expeditionary potential.
COMMUNITIES MOST ABLE TO BENEFIT		Bella Bella, Dawsons Landing, Pruth Bay, Shearwater	Klemtu, Bella Bella and Ocean Falls	Klemtu

Market, Economic and Social Criteria

Unit Name /Number		Outer Coast (1)	Fiords & Lakes(2)	Princess Royal Island (6)
Level of Competition		- regional: high - provincial: low - international: medium	- regional: high - provincial: low - international: medium	- regional: high - provincial: low - international: medium
Market Demand Potential		BC, regional US and international: high		
Impact/Conflict	Existing Recreation Use	Medium	Low	Low
	Other Land Uses	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry use	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry use	- may be medium to high regarding First Nations cultural sites (unknown) - may be low to medium regarding forestry use (unknown)
	Community Use or Plans	- fits with local tourism development initiatives of the Heiltsuk - Kitasoo: unknown - Oweekeno: unknown	- fits with local tourism development initiatives of Heiltsuk - Ocean Falls & Kitasoo: unknown	- fits with local tourism developments of the Kitasoo
Local Employment Impacts		Low - primarily in guiding, operations and marketing; seasonal; could create secondary employment in other tourism-related businesses		
Regulatory or Crown Tenure Requirements		Permit or tenure required		
Level of Community Support		- positive support by Heiltsuk if initiative is locally based - Kitasoo - unknown - Oweekeno - unknown	- positive support if initiative is locally based	- unknown
Infrastructure Requirements		Minimal infrastructure required; key purchase is equipment; transportation and accommodation infrastructure may be a barrier for some communities		
General Capital Requirements		Relatively small start-up capital requirements		
POLYGONS EXHIBITING HIGHEST POTENTIAL		**2,5,6,7,8,9,10,11**	**3,4**	**1, 2**

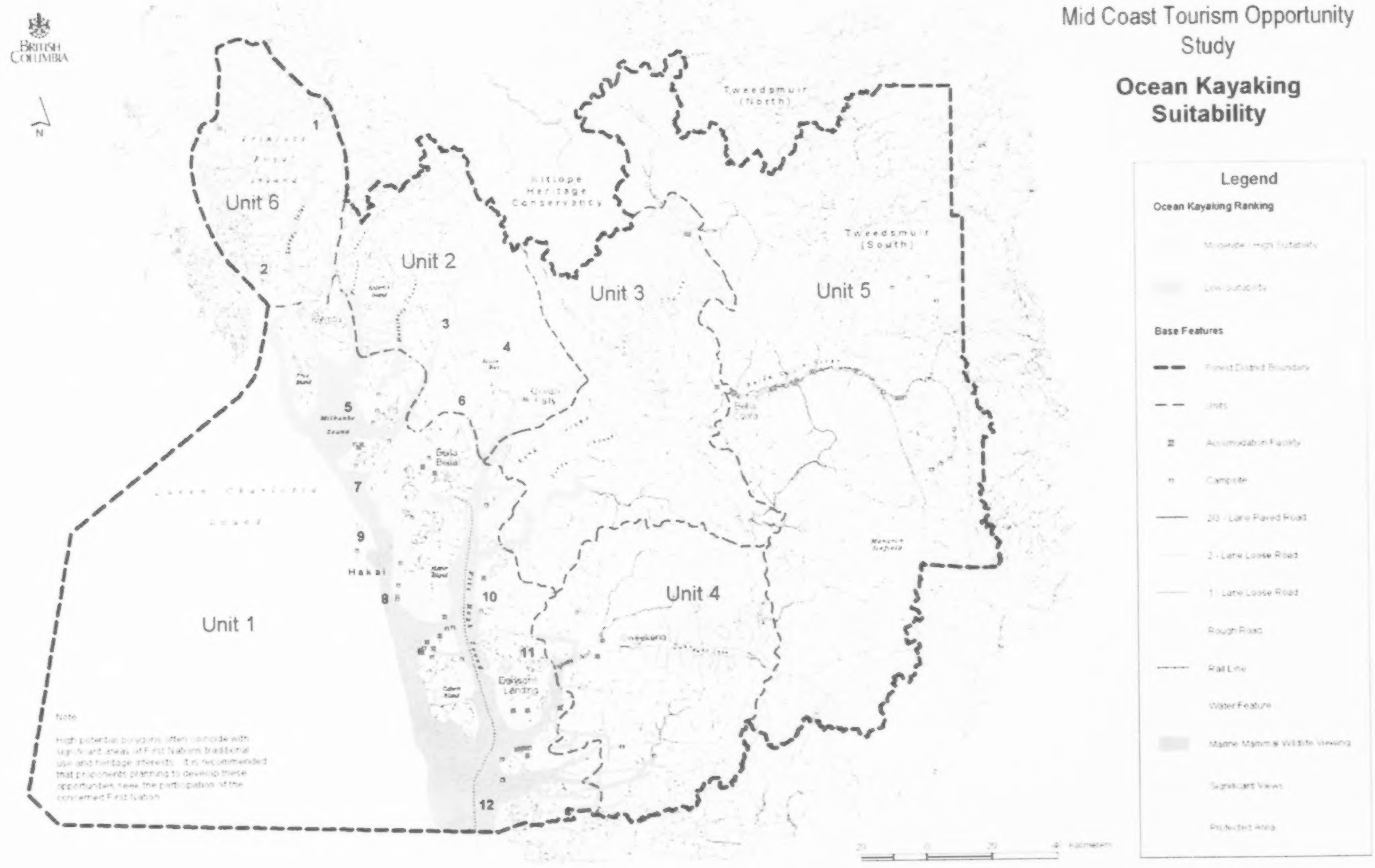
Refer to Table 6.1-1 for definition of foregoing criteria. See next page for definitions of highest potential polygons.

Table 6.3-3 : Descriptions of Highest Potential Polygons for the Ocean Kayaking Product

Polygon Number	Description of Polygon
1	Focus: Anchor and Canoona Lake Staging Area: Klemtu Large lakes suitable for ocean kayaking and canoeing. A marsh lined river joins the two lakes. An overland route if developed may provide access to Deer Lake and Surf Inlet (ultimately the west coast of Princess Royal). Towering cliffs, white sand beaches and excellent steelhead fishing enhance the opportunity. Very high Kitasoo First Nations interest. Ocean Kayaking associated product:: Air tour (access), Hiking (portage), Freshwater fishing
2	Focus: South Laredo Inlet - Kitasu Bay North Price Island Staging Area: Klemtu Islands and channels provide some shelter linking the mouth of Laredo Inlet to Kitasu Bay. There is an opportunity to link Kitasu Bay overland to Higgins Passage. Rugged and exposed coastline mixed with sheltered passes, beaches (including a large cobble beach along Kitasu Inlet), lagoons and coves provide a varied experience. Limited camping. Very high Heiltsuk First Nations interest. Adventure associated product:: Ocean Kayaking
3	Focus: Ellerslie Lake to Bullock Channel Staging Area: Bella Bella Ellerslie Lake has high cliffs and beaches and can be reached by a steep climb adjacent to a waterfall. Islands and passages offer protection. Bullock Channel has beaches along Yeo Island that can be used for camping. Shuttling from Bella Bella provides an opportunity for a return trip or for remaining in the area. High Heiltsuk First Nations interest. Ocean Kayaking associated product:: Ocean fishing.
4	Focus: Roscoe Inlet Staging Area: Bella Bella Fiord with towering rock cliffs, old growth, estuaries, very high First Nations values and heritage. Overland access to Ocean Falls. Ocean kayaking associated product:: Cultural heritage interpretation, Nature observation.
5	Focus: Troupe Passage-Return Channel Staging Area: Bella Bella Island grouping at north end of Troupe Passage. High First Nations values and heritage. Ocean kayaking associated product:: Hut systems, shuttling opportunities, Cultural heritage interpretation
6	Focus: Vicinity of Oliver Grove Marine Park Staging Area: Bella Bella Strategic cove and safe haven set behind a small island grouping that includes sheltered and exposed waters. High First Nations values and interest. Ocean kayaking associated product: Hut systems, shuttling opportunities, Cultural heritage interpretation
7	Focus: Archipelago including Athlone to Campbell Is. and Cunningham Is. Staging Area: Bella Bella Rocky coastline with highest tides marked by solid wall of forest. Occasionally punctuated by thin strips of soggy grass sandwiched between steep sharp rocky intertidal zones and the boggy forest. Difficult to find campsites, these include Cree Point and beach on Potts Island. High First Nations values and interest. Environmentally sensitive clambeds. Ocean kayaking associated product: Hut systems, shuttling opportunities, Cultural heritage interpretation
8	Focus: Hakai west side of Hunter Island. McNaughton, Spider, Triquet island groupings. Staging Area: Bella Bella Rocky coastline with highest tides marked by solid wall of forest. Many opportunities to explore the many inlets, lagoons, coves and the sheltered and windward side of islands. Interspersed with beaches. Approachable from Bella Bella by sheltered waters. Very high First Nations values and interest. Environmentally sensitive shell fishery. Ocean kayaking associated product: Hut systems, shuttling opportunities, Cultural heritage interpretation
9	Focus: Goose Group Staging Area: Bella Bella Exposed islands open to the full force of the ocean, the Goose Group contains beaches, lagoons and bogs. Very high Heiltsuk First Nations interest. Ocean Kayaking associated product:: Adventure, shuttling opportunities, Cultural heritage interpretation.
10	Focus: Namu to Koeye River Staging Area: Namu, Bella Bella, Shearwater Namu is the site of an old cannery still in evidence today and an ancient village and processing site of the Heiltsuk. Long pebble beach. South of Namu is Koeye River, is a prime habitat for the Grizzly bear. Ocean Kayaking associated product:: Cultural heritage interpretation, Nature Observation.
11	Focus: Fish Egg Inlet to Penrose Island to Dawsons Landing Stagoing Areas: Dawsons Landing Fish Egg inlet consists of A large inlet with numerous islands, a large lagoon with a possible linkup to Elizabeth Lake (and a potential route by portage to Hardy, Moses and Rivers Inlet to Dawsons Landing). Rocky shores with forest to the high tide mark. Very few camping locations. Penrose Island and adjoining islands include beaches. Dawsons Landing provides supplies. Many areas to explore. Ocean Kayaking associated product: Nature Observation, circle tour opportunities presently undeveloped requiring portage.

Mid Coast Tourism Opportunity Study

Ocean Kayaking Suitability


British Columbia
N
Unit 1
Unit 2
Unit 3
Unit 4
Unit 5
Unit 6
1
2
3
4
5
6
7
8
9
10
11
12
Princess Royal Island
Kitlope Heritage Conservancy
Tweedsmuir (North)
Tweedsmuir (South)
Klemtu
Milbanke Sound
Ocean Falls
Bella Bella
Bella Coola
Queen Charlotte Sound
Hakai
Fitz Hugh Sound
Owikeno
Dawsons Landing
20 0 20 40 Kilometers
Legend
Ocean Kayaking Ranking
Moderate / High Suitability
Low Suitability
Base Features
Forest District Boundary
Units
Accommodation Facility
Campsite
2/3 - Lane Paved Road
2 - Lane Loose Road
1 - Lane Loose Road
Rough Road
Rail Line
Water Feature
Marine Mammal Wildlife Viewing
Significant Views
Protected Area

Note

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

6.4 Nature observation

6.4.1 Resource Assessment

Wildlife and natural history viewing are activities closely associated with ecotourism because they are low impact and non-consumptive. They are also linked to many other activities such as coastal cruising, ocean kayaking and sport fishing. Ecotourism is a growth industry, and a trend that is expected to continue.

The Mid Coast offers tremendous opportunities in this product area. The coastline has been molded by glaciation and sculpted by water and wind activity. There are numerous inlets, coves, bays, islands, islets, shoals, lagoons and beaches. Large lakes, many containing scenic cliffs and beaches, are abundant in the region. There are numerous small creeks and a number of river systems (the largest are the Bella Coola, Dean and Machmel) that empty into the Pacific Ocean. There are various circuit opportunities associated with islands and there is a marine/lake linked product associated with Fish Egg Inlet, Elizabeth Lake, Hardy and River Inlets (portage required and presently undeveloped).

The area has moderate value for Grizzly bear viewing and Princess Royal Island is renowned for the Kermode bear. Other faunas are abundant and can be sighted along rivers and adjacent mountains -- these include mountain goats, black bear, eagles, and migrating birds. The rivers are traditionally well known for salmon and steelhead that are ideal for fishing and for viewing during spawning. Few of the sub-products can exist in isolation; they are interrelated and, when several are combined, can be developed into a viable tourism product for the Mid-Coast.

Table 6.4-1: Region SWOT Analysis for Nature Observation

Strength	Quality and quantity of natural and wildlife features, very high marketability for both marine-based (Orcas, whales) and land-based (Kermode bear, grizzlies) species as well as the extensive intact coastal rain forest (old growth and the possibility of unique trees). Proximity to communities. Growing global awareness of Great Bear Rain Forest.
Weakness	Operator attention to resource management issues. Level of support facilities and services available (in terms of washrooms, buildings, parking areas, etc.). Insects. Unreliability of wildlife sightings. Cost to access region. Cost of fuel for boats involved in wildlife observation.
Opportunity	Infrastructure development (e.g. trails and viewing platforms), interpretive touring, touring products linking wildlife, natural features and built facilities (e.g. lighthouses). Linkage to high opportunity activity such as ocean kayaking or boating.
Threats	Unknown tourism impacts on wildlife behaviour & reproductive capacity (e.g., whales and birds). Poor harvesting practices and design can affect scenery and reduce the numbers of large trees. Where bear viewing is frequented, the potential for habituation of bears to tourists is a concern to the safety of both. Direct impacts on wildlife behavior.

The Mid Coast and Nature Observation

There are a variety of wildlife and natural history features in the region that can be developed and marketed in a variety of ways that could benefit the communities that rely on them. Tourism provides a non-consumptive opportunity that can be advanced with cultural and environmental sensitivity.

The nature observation product can be linked to the culture and heritage of the region through interpretation and awareness building. The Heiltsuk, Kitasoo, Nuxalk and Oweekeno First Nations people have historically derived their sustenance from the bounty of the land and the rich marine resources. The abundances allowed time for arts and ritual. The First Nations continued presence as a people and the subtle historical evidence of their relationship to the natural surroundings heightens the feeling of mystery and wonder for the recreationist along the coastline. Later migrations of people include Alexander Mackenzie[1] who reached the Pacific Ocean in 1793. His arrival to the Pacific shore was followed by explorers in ships trading for furs. Later migrations included those who arrived to exploit and process the natural resources. Evidence can be seen in abandoned canneries, settlements and timber harvesting.

Geographic Features

The coastline has been shaped by glaciation, water and wind activity. There are copious numbers of inlets, coves, bays, islands, islets, shoals, lagoons and beaches. The region boasts several smaller rivers of significance and a number of large rivers that link the coast to the interior. Unique and scenic lakes with towering cliffs can be found along the outer coast and Princess Royal Island. The alpine areas of the remote Coastal Mountains are difficult to reach but offer the enthusiast and air tours untouched expanses of snow and tundra. Many of the opportunities found in the region are internationally significant.

Hotsprings

There are four primary hotsprings (and other minor or potential) noted in the study area. These include:

- Tallheo- in South Bentinck, consisting of a number of pool clusters. The most popular is the soaking pool just two meters from the high tide mark. This site has First Nations significance, and the Nuxalk people identify three longhouses associated with the site. Linked to Bella Coola and the Nuxalk.
- Nascall - located on private land and consisting of two springs. Linked to Bella Coola and Ocean Falls.
- Eucott Bay (previously developed) offers good anchorage and the springs are among the largest and best known along the coast. There are sets of springs across the bay from the other. The main spring to the west has a high mineral content. The southwest pools include a set with body sized mud soaking pools. Evidence of former development can be found in the ruined bathtubs and pilings. Linked to Bella Coola, Bella Bella and Ocean Falls.
- Sheemahant - (partially developed) cluster of springs. Bathhouse is to the right of the logging road. Hot water issues from cracks in bedrock down cliffs and into a small hot creek, which is held in a boiler tank to cool, and piped to a bathhouse. Developed and maintained by loggers. Potential development by the Oweekeno.
- Thorsen Creek (undeveloped) - reputedly hot enough for soaking. Linked to Bella Coola.

Large Rivers

The Bella Coola, Kimsquit and Dean rivers are the best known. Each links the coast to the interior and is noted for its historical trails. River fishing is notable with the Dean River having an international reputation for steelhead that put up an extraordinary struggle. Other rivers such as the Kimsquit and the Bella Coola/Atnarko provide excellent bear observation and boat drifting.

---

[1] He is the first documented traveler to cross the North American continent

Estuaries

There are a number of large estuaries in the region that provide good nature observation. Bear and birds are the most visible wildlife to frequent the estuaries. Major estuaries include the Bella Coola, Kimsquit, Koeye, Oweekeno, Kwatna, and Taleomy. Viewing platforms and blinds may benefit observation of the wildlife and provide excellent opportunities for interpretation.

Marshes

There are marshes located along the major rivers and on the edge of a number of lakes. The link between Anchor and Canoona Lake has a large marsh, which is a protective area for many animals and offers interpretive qualities.

Lakes

Numerous scenic lakes in region with good sport fishing. Those with the highest scenic values with lofty peaks and cliffs include Oweekeno Lake, Ellerslie Lake, Anchor and Canoona Lake, Roderick Lake and Deer Lake. Many have notable fishing opportunities and white sand beaches. Anchor/Canoona Lakes have a reputation for excellent Steelhead fishing and Ellerslie, Anchor, Sagar and Four Lakes have fine beaches. The scenery and the presence of white sand beaches make these coastal lakes provincially significant and there are touring opportunities.

Cliffs, Gorges and Escarpments

The coast has a scattered collection of these features. Some of the most significant are found near the entrance in Fiordland Provincial Park and Anchor Lake. Dean and Burke Channels are well known for the towering, steep mountains that flank the channels. Ideal for the marine tour product.

Forests and Large Trees

The area is noted for the expanse of old growth forest. The outer coast forest has smaller trees due to the poor growing regime whereas the inner coast and valleys are better growing sites with the expectation that there are opportunities for the presence of large trees. Traditional and current harvesting has reduced the numbers of these large trees substantially.

A large tree can be different for each species however a tree with high recreation and tourism value is generally large in radius and inspires awe. These trees are hundreds of years old and if harvested will not return in the foreseeable future (hence, a lost feature).

This is ideal for the marine tour and canopy walk product. There are tremendous interpretation opportunities. Big trees have been identified in Roscoe Inlet and in some of the remaining drainage.

Waterfalls

Numerous waterfalls of minor significance are found throughout the region, and provide a scenic backdrop.

Islands, Archipelagos

The outer coast is a large archipelago with significant island groupings west of Hunter Island and Campbell Island. There are excellent boating and kayaking opportunities that can support interpretation.

Alpine, sub-alpine

The Coast Range has extensive remote sub-alpine and alpine features including glaciers and icefields. The alpine/subalpine areas are rugged and generally difficult to access. These features provide ski touring and air tour opportunities and are ideal for the interpretation of glacial forces.

Aquatic Landscape

Aquatic landscapes can be found throughout the coast. Competition with other regions is high as there are numerous areas on the BC coast which provide a similar experience for scuba diving. Charter boats identify the high costs to fuel and running time required in dive shuttling, low fees and the potential for damage to the fiberglass boats. Safety concerns related to the distances away from decompression chambers and medical help.

Wildlife

Wildlife viewing includes both marine and land-based viewing opportunities. Viewing of Orca, Grizzly bear and the Kermode bear -- three species that can be found in the region -- are internationally renowned. Many rivers are well known for salmon and steelhead and are ideal for fishing and viewing of spawning. Oolichans may be viewed in the region. Bald eagles and waterfowl are abundant. The shorelines contain shellfish, starfish and other forms of aquatic life. In addition to Orcas, several other whale marine species can be viewed. The deeper waters are home to halibut, octopus and wolf eels. The sea otter is reputedly found in the kelp off Goose Island.

Land Based Wildlife

Bears

The Mid-Coast has an international reputation for the presence of Grizzly bears and the Kermode or "Spirit" bear. Bear observations are best undertaken from a viewing platform or from a boat along the coast or river. The reliable presence of bears is an important component of the nature observation product.

Bear observation is linked to available optimal locations to view feeding activities. These are associated with the emergence of new grasses and sedges in the estuaries during spring, the arrival of the salmon, the availability of bird eggs in the estuaries and the bounty of berries in known patches.

The low to moderate reliability of observing bears, shortness of season, lack of dependable sites for viewing, and the limited number of viewing areas close to population centers are an impediment to commercial viewing opportunities.

A common occurrence along the coast is the hunting of bears and the frightening of bears by fishermen away from choice fishing ground. This often results in wary, elusive bears -- reducing the observation opportunities. If hunting and harassment pressures are reduced, chances of sightings would likely increase. On the other hand, carelessness among fishermen when disposing fish waste and the constant presence of humans has resulted in the habituation of bears to humans. This is a safety concern for humans and a liability to the bear. Passive measures must be used to assure viewer safety. The identification of safe, discrete viewing areas, the building of safe viewing platforms, the use of boats and other means to ensure that bear watching does not disturb the bear or bring attention to human interaction is a move in the right direction.

- *Grizzly*

Primary viewing areas are as follows.

Area	Unit	Community	Designation	Comments
Khutze	Outside 6C	Klemtu, Bella Bella	Crown	Tidal areas, viewable from marine. Unreliable sightings.
Green Inlet/Lagoon	Outside 6C	Klemtu	Crown	Tidal areas, viewable from marine. Unreliable sightings.
Koeye	1D	Bella Bella	Crown	Tidal area, viewable from marine. Unreliable sightings
Kimsquit	5A	Bella Coola	Crown, IR	Tidal areas, river, viewable from marine and river. High sighting potential in spring and during salmon runs.
Atnarko	5D	Bella Coola, Hagensborg	Provincial Park, Crown	River, viewable from land and river. Moderate sighting potential in spring and during salmon runs.

The primary season is in May, June and July. Bears congregate at the intertidal zone to graze on sedges before the arrival of berries, salmon and other foods that arrive in spring and fall. With some exceptions, the topography of most rivers in the region allows the bears to spread out during the salmon season limiting the congregation of bears and the subsequent viewing capabilities. The clear waters of the Atnarko attract bears during salmon season.

- *Kermode "Spirit" Bears*

This species has been dubbed the Great Spirit bear and is found in an area encompassing Princess Royal Island, Gribble Island and the mainland from Kitimat to Terrace. The bear is uncommon and the level of confidence for an ensured sighting is low except possibly in areas held in strict confidence. The opportunity to view this bear has been heavily marketed. Princess Royal Island is the best known destination, with Klemtu the primary staging area.

- *Black Bears*

This species can be observed throughout the region. Although common, the level of confidence for an ensured sighting is low.

Mountain Goats

Primary Viewing Areas: May be observed along steep coastal areas including Oweekeno, Fiordland. The goats are generally a considerable distance from viewing areas and require the use of binoculars.

Elk

This species can be observed in a number of valleys with the Kilbella and the Chuckwalla reputed to have the highest opportunity.

Marine Based Wildlife

Whales

Sightings of Orcas, dall porpoises and white-sided dolphins are generally common. The Humpback and Grey whales migrate through the region in the spring and fall. The limitations for whale watching in the region include higher fuel costs associated with whale watching (generally requires constant running of the tour boat) and unreliability of sightings. Although sightings are seasonally consistent, they can be unreliable on a daily basis.

Humpback and Grey Whales

Both species are migratory and pass the Mid Coast in the spring and fall. Cape Caution is noted for the presence of Grey whales. Grey whales have been seen in a number of bays including Bella Bella.

Orcas

There are resident populations that can be viewed year-round but there is not a single location that they are known to frequent (such as Robson Bight, off Vancouver Island[2]). Therefore the whales may be common by the reliability of sightings is low. There is reputed to be a rubbing beach in the outer coast and this may hold a possibility for sighting reliability.

Other marine mammals

- *Sea Otters*

There is reputed to be a colony in the Goose Island group.

- *Sea Lions and Seals*

Viewing opportunities can be found in many areas along the coast. There are a number of seal haulout including one to the south of Goose Island.

---

[2] The whales rub themselves on the round gravel shoreline found in Robson Bight.

Fish

- *Salmon*

The region boasts an excellent sports fishery but has moderate viewing potential. Major rivers are generally muddy and the visibility poor. The smaller rivers have a limited influx of salmon thus limiting the opportunity for developing viewing areas. Significant sites include the bridges along the Bella Coola River.

- *Oolichans*

Oolichan traditional runs include the Kimsquit, Bella Coola and Oweekeno Rivers and take place in the spring. A tremendous number of predators would accompany the fish including thousands of seagulls, eagles, sea lions, seals, Orcas and other species. The past years have seen a tremendous decline in the numbers of oolichans returning to these rivers and it is feared that these runs will never return.

- *Herring*

A large run of herring enters the protected waters to spawn in the kelp during the spring. Two types of fisheries take place -- the harvesting of herring by net and the harvesting of roe attached to the seaweed. This is an active time for the native fisheries and many people are involved. It offers a tremendous opportunity for interpretive tourism targeting not just the Japanese (who are major consumers of roe) but other groups as well.

The *oolichan* and the *herring* fisheries follow the long winters and herald the beginning of a new year for the First Nations people. There are tremendous opportunities for cultural and nature interpretation. The primary drawback is the time of year (it is early), the uncertainty as to when exactly the fish will arrive, and the fact that many of the residents are extremely busy at the fishery.

Birds

Eagles

Eagles are very common along the coast with increased concentrations found during salmon and oolichan runs.

Trumpeter Swans

There is a flyway of swans along the Bella Coola River to the Atnarko where they are known to congregate in Lonesome Lake (within Tweedsmuir Provincial Park). Swans are also evident in the estuaries along the coast. The most visible are the 30+ swans located in the Bella Coola estuary.

Other Birds

Marine rock promontories offer rookeries and safety for aquatic birds. These are extremely sensitive to human visitations and constraints may have to put in place thereby limiting the opportunities. Red, blue and yellow species are found in many areas of the coast.

Waterfowl is abundant throughout the region. However, other regions in BC have greater bird watching significance.

6.4.2 Market, Economic and Social Assessment of Nature Observation

Competition

On the Mid Coast there are currently no tourism operators who identify nature observation as their primary activity. However, several businesses do promote the natural scenery and the area's wildlife as part of the experience of the tourism product they do offer. This is typical throughout the coast where the majority of businesses such as ocean kayaking, marine cruising, and others identify nature observation as a key attraction.

There are several businesses on the west coast that specialize and promote nature observation exclusively. In the North Coast Forest District there are two operators who have park permits to the Khutzeymateen Provincial Park. These operators specialize in Grizzly bear viewing. Throughout Vancouver Island there are approximately 85 commercial whale watching tour boat operators with several of these operators clustered in Victoria and Tofino.

Market and demand

On the Mid Coast, land and ocean based wildlife viewing will likely continue to be linked to other activities such as marine cruising, destination lodges, or ocean kayaking. Non-consumptive use of wildlife resources has been identified as one of the fastest growing components of tourism around the world. There has clearly been a shift in traveler preferences over the past decade with regards to appreciation and participation in land and marine based tourism activities and wildlife viewing. Wildlife viewing has been projected to grow by approximately five percent annually in BC. Wildlife viewing, with 20 percent of participants being 55 years or older, has the highest average mature adult participation rates among ecotourism activities.

BC has become recognized worldwide for its diversity of wildlife and scenic viewscapes. While visitors to BC may undertake several activities on their visits, many spend some or all of their time participating in some form of land-based and marine-based activities. **Table 6.4-2** outlines the participation rates for land-based and marine-based activities identified from the 1996 tourism survey in BC.

Table 6.4-2: BC 1996 Visitor Survey: Land Based Participation			
	Number of Total Visitors	Participation	
		Land-Based Activities[3]	Marine-Based Activities[4]
Long Haul US (California/Hawaii, Mountain States, Central & Eastern States, and Mexico)	1,958,000	69%	18%
Regional US (Washington, Oregon, Idaho, Montana, Alaska)	3,615,000	58%	13%
Regional Canada (Alberta, Manitoba, Saskatchewan, NWT, Yukon)	3,706,000	64%	17%
Long Haul Canada (Rest of Canada)	1,196,000	59%	7%
Europe	535,000	79%	21%
Asia/Pacific	828,000	66%[5]	18%

Source: Tourism British Columbia

Land Use and Planning Impacts

Existing Recreation Uses

Recreational use is generally low throughout the areas identified for nature observation opportunities. However, since wilderness viewing could involve a variety of different access methods (ie., helicopter to hiking) each approach will have to assessed prior to determining the impact on current recreation activities. However, in general, moderate growth in commercial wildlife viewing should not create conflict with existing recreation uses.

Other Land Uses

For nature observation, visual quality and wildlife populations and corridors will be a critical consideration for this type of product. Therefore, forest practices carried out within key wildlife areas will need to be planned accordingly.

Proponents of new nature observation ventures will also need to work with local First Nations to ensure current community uses and culturally sensitive sites are not disrupted. Recently, some First Nations have raised concerns surrounding the contamination of kelp beds with human waste by ocean kayakers. As well, several culturally sensitive sites are in close proximity to significant wildlife viewing areas.

---

[3] Land based activities include: visiting National/Provincial parks, Wildlife viewing/bird watching, hiking/backpacking, exploring backcountry wilderness.

[4] Marine-based activities include: ocean boating (sail/power) and whalewatching.

[5] For the sub-category "All other Asia/Pacific" (excluding Australia, New Zealand, Japan) participation in land based activities jumps to 85%.

Community Use or Planning

The development of nature observation activities would likely fit with the tourism development objectives of local communities. For those communities on the Mid Coast that have explored tourism development, all have recognized the value of wildlife viewing to the development of their tourism products. The Bella Coola Valley, Hartley Bay, Kitasoo, and Heiltsuk First Nations are either developing or exploring tourism initiatives which would capitalize on the local wildlife and natural features.

Employment Impacts

Seasonal employment would be generated for guides, and in the areas of marketing and operations. Wildlife viewing guides need to be good interpreters to maximize the visitors' experience, so special training will likely be required for guide to achieve the required skills.

Regulatory or Crown Tenure Requirements

If a private trail or campsite development were to be built for wildlife/nature history viewing then a tenure or permit from BC Assets and Land Corporation would be required. If a public trail or campsite was to be used, then agreements for use and maintenance with the Ministry of Forests would be required. Activity targeted within provincial parks would require park use permits. Operators will need to follow the policies developed for commercial recreation on crown lands.

Level of Community Support

Most communities on the Mid Coast are actively exploring the incorporation of wild life and nature viewing into tourism products they are currently developing or exploring.

Infrastructure Requirements

The infrastructure requirements for nature observation activities will depend greatly on the associated mode of transportation and the structure of the events surrounding the wild life viewing as well as whether it is land-based or marine oriented.

General Capital Requirements

The capital requirements will vary, depending on how the nature observation activities are structured and to what degree existing infrastructure (ie., accommodation, air transportation) is involved.

Table 6.4-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Ocean Kayaking Product have been identified as *polygons* on the map and are described in Table 6.4-3.

Table 6.4-3: PRODUCT ANALYSIS TABLE: NATURE OBSERVATION

Unit Name/Number		Outer Coast (1)	Fiords & Lakes(2)	Channels (3)	Oweekeno (4)	Mountains & Trade Routes (5)	Princess Royal Island (6)
Resource Criteria							
Uniqueness of Key Features	Geographic	High (islands, lakes with beaches)	High (cliffs, rock)	High (deep fiords)	High (deep fiords)	High (valleys, alpine, glaciers)	High (lakes with beaches, cliffs)
	Marine Wildlife	Medium (common but unreliable)	Low (common but unreliable)	Low (relatively common but unreliable)	Low (relatively common, unreliable)	N/A	Low (relatively common but unreliable)
	Land Wildlife	Medium (site specific but unreliable)	Medium (site specific but unreliable)	Low	Medium (site specific with some reliability)	High (site specific with high reliability)	High (unique species with high reliability)
Supportive Resources	Estuaries/Marshes	Medium	Medium	High	Medium	Medium	Medium
	Salmon Rivers	Low (Koeye)	Low	Medium (spread apart)	Medium (spread apart)	Medium (spread apart)	Low
	Hotsprings	-	-	Three	One	One	-
	Cliffs/Gorges	Low	High	Medium	Medium	High	High
	Alpine / Subalpine	Low	Medium	Medium	Medium	High	Low
	Aquatic	High	Medium	Medium	Medium	-	Medium
	Large Trees	Low	Medium	Medium	Medium	Medium	High (?)
Existence of Supportive Infrastructure		Low	Low	Low	Low	Low	Low
Associated Products		Marine cruise, road tour, culture and heritage, hiking, scuba diving, cultural heritage interpretation					
Significance of Associated Products		High	High	High	High	High	High
Access to Sub Unit Area		High	Medium	High	Medium	High	Medium
Access from Staging Area to Resource		High	Medium	Medium	Medium	Medium	Medium
Prime Season		Spring to Fall	Spring to Fall	Spring to Fall	Spring to Fall	Spring to Fall	Spring to Fall
Resource Discussion (refer to DESCRIPTION for details on this complex subject)		- Mod. Suitability - Forests, Islands - Lakes with beach - Aquatic, Herring - Grizzly (Koeye) - Orcas and whales (common, unreliable)	- Cliffs - Forests - Fiords - Lakes	- Fiords - Steep terrain - Herring - Hotsprings	- Herring, Oolichan (possibly) - Cliffs - Mountain goats - Grizzly bears - Hotspring	- Rivers - Grizzly bears - Mountain goats - Salmon	- Kermode bear - Lakes with beach - Cliffs
Communities Most Able to Benefit		Klemtu, Bella Bella, Shearwater, Dawsons Landing	Bella Bella, Shearwater, Ocean Falls	Bella Coola, Bella Bella, Ocean Falls, Namu	Rivers Inlet, Oweekeno	Bella Coola	Klemtu, Hartley Bay

Market, Economic and Social Criteria							
Unit Name/Number		**Outer Coast (1)**	**Fiords & Lakes(2)**	**Channels (3)**	**Oweekeno (4)**	**Mountains & Trade Routes (5)**	**Princess Royal Island (6)**
Level of Competition		Regional: Low Provincial: Low to High – depending on the specific activity or product focus. For example, whale watching is high in BC while other activities would be lower. International: Moderate to High – again depending on the specific natural observation product.					
Market Demand Potential		Provincial: moderate to high. Regional US: High International: High					
Impact/Conflict	Existing Recreation Use	Low to Moderate	Low	Low	Low	Low to Moderate	Low
	Other Land Uses	First Nations' cultural sites and traditional uses will need to be consider with specific sites and areas being considered for nature observation activities.					
		Forestry use – low	Forestry use – med to high	Forestry use - low	Forestry use – med to high	Forestry use – med to high	Forestry use - low
	Community Use or Plans	Would need to balance with alternative local uses to mitigate potential community impacts.					
Local Employment Impacts		Each area would typically only be able to support a small amount of employment however, across the entire Mid Coast this employment could be signficant.					
Regulatory or Crown Tenure Requirements		The appropriate portions of the commercial recreation on crown land policy will apply.					
Level of Community Support		Bella Bella actively exploring opportunities.	Bella Bella and Shearwater actively exploring opportunities.	Communities exploring nature observation within their tourism planning.	Community support unknown.	Communities exploring nature observation within their tourism planning.	Communities exploring these activities within their tourism planning.
Infrastructure Requirements		Infrastructure requirements will depend on the associated mode of transportation and the structure of the events surrounding nature observation.					
General Capital Requirements		Capital requirements will vary, depending on how the nature observation activities are structure and to what degree infrastructure exists.					
POLYGONS EXHIBITING HIGHEST POTENTIAL		**3,4,5**	**2**	**6**		**7**	**1**

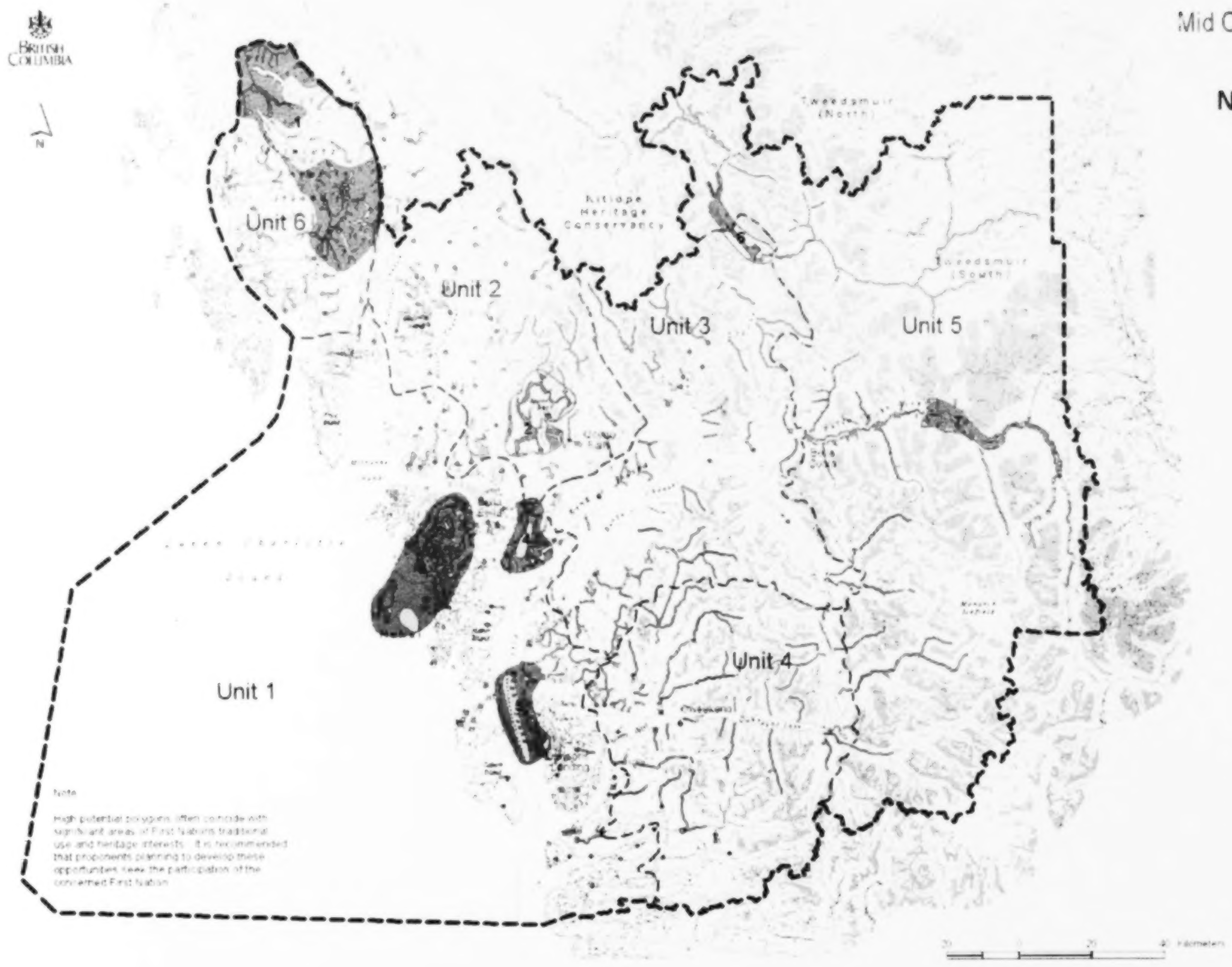
Refer to Table 6.1-1 for definition of foregoing criteria. See next page for definitions of highest potential polygons.

Table 6.4-4: Descriptions of Highest Potential Polygons for the Nature Observation Product

Polygon Number	Description of Polygon
1	Focus: Princess Royal Island Staging Area: Hartley Bay and Klemtu This polygon contains dramatic cliffs, fish bearing lakes and rivers, inlets, lagoons, old growth forests and other features including the rare Kermode Bear. Possibility of large trees. Nature Observation associated product: Marine Cruising, Ocean Kayaking, Hiking, Cultural Heritage Interpretation, Scuba Diving, Destination Lodge
2	Focus: Roscoe Inlet Staging Area: Bella Bella, Ocean Falls This polygon contains dramatic scenery, goats, estuaries, fish bearing streams, salmonids and large trees. High First Nations values and concerns. Canopy walk and lodge potential. Nature Observation associated product: Marine Cruising, Ocean Kayaking, Hiking, Cultural Heritage Interpretation, Scuba Diving, Destination Lodge
3	Focus: Outer Coast – Bella Bella to Goose Island Group Staging Area: Bella Bella This polygon contains extensive outer coast natural values including intertidal zones, aquatic life, lagoons, estuaries, seal haulouts, bird rookeries and common but unreliable marine mammal viewing. High First Nations values and interest. Potential for viewing the herring roe fishery. Nature Observation associated product: Marine Cruising, Ocean Kayaking, Hiking, Cultural Heritage Interpretation, Scuba Diving, Destination Lodge
4	Focus: Fitz Hugh Sound and Codville Lagoon Staging Area: Bella Bella This polygon contains common but unreliable marine mammal, superb aquatic life, fish bearing river, salmonids, lakes with beaches. Nature Observation associated product: Marine Cruising, Ocean Kayaking, Hiking, Cultural Heritage Interpretation, Scuba Diving, Destination Lodge
5	Focus: Fitz Hugh Sound and Koeye River Staging Area: Bella Bella and Dawsons Landing This polygon contains common but unreliable marine mammal, superb aquatic life, fish bearing river, salmonids, lakes with beaches and grizzly bears. Inadequate locations for bear viewing opportunities. Safety concerns and potential for habituation. Nature Observation associated product: Marine Cruising, Ocean Kayaking, Hiking, Cultural Heritage Interpretation, Scuba Diving, Destination Lodge
6	Focus: Lower Kimsquit and Dean Rivers Staging Area: Bella Coola This polygon contains estuaries and high salmonid viewing potential. Very high grizzly viewing potential along the Kimsquit. Inadequate locations for bear viewing opportunities. Safety concerns and potential for habituation. Floats down river must be aware of log jams. High First Nations (Nuxalk and Heiltsuk) values and interest. Potential for viewing the herring roe fishery. Nature Observation associated product: Marine Cruising, Hiking, Cultural Heritage Interpretation, Destination Lodge, River Floating
7	Focus: Firvalle to the Atnarko River Staging Area: Bella Coola This polygon contains high grizzly viewing potential along the Atnarko River. Inadequate locations for bear viewing opportunities. Safety concerns and potential for habituation. Floats down river are a viable option. Mountain goat viewing along road at Firvale (using binoculars). Salmon viewing on bridges along the Bella Coola River. Trumpeter Swan flyway to the Lonesome Lakes. Nature Observation associated product: Hiking, Cultural Heritage Interpretation, Destination Lodge, River Floating

Mid Coast Tourism Opportunity Study

Nature Observation Suitability


British Columbia
N
Unit 6
Unit 2
Unit 3
Unit 5
Unit 4
Unit 1
Kitlope Heritage Conservancy
Tweedsmuir (North)
Tweedsmuir (South)
Queen Charlotte Sound
20 0 20 40 Kilometers

Note

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

Legend

Nature Observation Ranking

▨ High Suitability

Moderate Suitability

Base Features

Forest District Boundary

Units

Accommodation Facility

Campsite

Salmon Bearing Stream

Fish bearing stream

2/3 Lane Paved Road

2 Lane Loose Road

1 Lane Loose Road

Rough Road

Rail Line

Water Feature

Linear Marine Cruise

Marine Circle Tour

Marine Mammal Wildlife Viewing

Alpine Tundra

Significant Views

Protected Area

6.5 Marine Cruising

6.5.1 Resource Assessment

Discussion

The marine cruising product encompasses a range of vessels, from large ocean going ships carrying hundreds of tourists to smaller boats carrying less than a dozen passengers. The focus of this resource evaluation is on smaller vessels with linkages to the Mid-Coast communities whose product is associated with wildlife and natural history, and culture. Small vessel cruising itself has several distinct segments:

1. The "Northwest Pocket Cruise" segment in which Alaskan or Washington-based operators cruise through Canadian waters enroute to other US based ports. Generally, these operators carry from 50 to 120 passengers and cruise BC waters before and after the main Alaska summer season.
2. The "Regional Pocket Cruise" has potential to link various ports to Vancouver and Victoria. Associated with linear marine tours.
3. The more conventional adventure/ecotourism marine cruising segment involving smaller ships, usually sailing vessels or motor yachts, and fewer passengers. Activity may be guided or unguided and can often involve camping as a secondary activity. Associated with linear or circle tours.
4. The mothership kayaking segment, which involves kayak touring based on a live-aboard vessel which transports the kayaks and passengers from destination to destination. This expands the range visitors can travel and allows for more luxurious amenities while decreasing land-based campsite needs/impacts and vulnerability to declining weather conditions. Associated with linear or circle tours.
5. There is an opportunity to provide circle pocket tours with stopovers in optimal areas, in gateway communities close to feature clusters including wildlife, for smaller motorized vessels. This is generally associated with circle tours.

Two types of marine cruise tours are discussed here:

- The *linear marine cruise* that goes from one port to another and culminates at different port from where it began. These are multi-day and include the "Regional Pocket Cruise" and the more conventional adventure/ecotourism large vessel marine cruise.
- The *circle marine cruise* that returns to the point of departure. This tour is more closely linked to smaller craft that can cover a great distance in a short period of time. Although the multi-day opportunities present themselves, shorter travel periods from a couple of hours to a day are optimal.

The success of a diverse regional pocket cruise requires:

- dramatic scenery and unique features;
- the assurance of wildlife viewing opportunities;
- the development of infrastructure (fueling, pump-out stations, fresh water supplies, etc.);
- agreement and coordination of marine/remote lodges -- suitable product for the lodges;

- community involvement; historical and cultural exposition, archaeological exhibition, lighthouse access and interpretation; and,
- linkages to other tourism products, such as air or bus circuit tours with a marine cruising component.

Table 6.5-1: Region SWOT Analysis for Marine Cruising

Strength	Sportfishing, range of remoteness, scenery, high value features including wildlife and natural features, culture, presence of lodges, lighthouses, remote communities and tourism infrastructure.
Weakness	High precipitation. Inner coast - great distances between outstanding features and communities. Lack of organized tourism related activities in a number of communities (e.g. cultural interpretation shows) and lack of infrastructure including availability of holding tank pump-out stations, high costs to develop infrastructure. Insects during some parts of the year. High tidal variances are a hazard for cruisers lacking local knowledge. There are no areas that provide assured whale, orca or bear sightings.
Opportunity	Development infrastructures, support products to pocket cruises, cultural and historical exposition. Linkages to on-shore commercial businesses, including tours/ interpretation.
Threats	Forest harvesting (with visual and environmental concerns), land use uncertainties, lack of community support, liquid and garbage waste disposal, contamination of anchorage sites and shellfish beds/aquaculture.

Marine Cruises and the Mid Coast

The Mid-Coast is extensive and offers the scenic quality, the unique geographic features, the possibility for observing wildlife and the opportunity for cultural/heritage interpretation necessary for a successful Marine cruise product. Communities such as Bella Bella, Ocean Falls, Shearwater, Dawsons Landing and Bella Coola offer the required amenities and provide access to optimal areas. A discussion of the Mid Coast linking the units with the *type* of marine cruise provides an overview of the opportunities.

A summary of the Mid Coast as it relates to a successful marine cruise product is as follows.

- Dramatic scenery and unique features: The Mid Coast has the dramatic landscapes of Burke and Dean Inlets, Fiordland Recreation Area, Oweekeno Lake, Elerslie Lake, Roscoe Inlet and the lakes within Princess Royal. The landscape of the outer coast with the many islands, bays, lagoons and inlets manifests an air of mystery.
- Assurance of wildlife viewing opportunities: The Mid Coast coastline has areas where wildlife are common but sightings are not assured.
- Development of infrastructure (fueling, pump-out stations, fresh water supplies, etc.): There are a number of marinas and communities along the outer coast.
- Agreement and coordination of marine /remote lodges: There are numerous lodges focused on sportsfishing. An opportunity can present itself to have a lodge tour or for lodges to provide scenic or interpretive circle tours.
- Community involvement (historical and cultural exposition, archaeological exhibition, lighthouse access and interpretation): The Mid Coast has a rich but visually subtle history. Opportunities exist that may

benefit both native and non-native communities. There are, however, few lighthouses and existing former canneries.

- Linkages to other tourism products, such as air or bus circuit tours with a marine cruising component: Bella Coola has a suitable road tour product. An opportunity may exist to link Ocean Falls to Roscoe Inlet and between Bella Coola and South Bentinck (the "Big Tree" tour). A boat can link this road tour to Tallheo Hotsprings with a return to Bella Coola.

By virtue of distance and features, there appear to be more opportunities for marine cruise development on the outer coast. Bella Coola is situated much further inland than the other communities of the Mid Coast, at the east end of North Bentinck Arm. A boat travelling from Bella Coola is required to travel considerable distance to attractions like Sir Alexander Mackenzie Park or the Eucott Hot Springs. Furthermore, a smaller, faster boat is required in order to make the return trip in a half day. A local tourism operator has pointed out that boats should generally return to Bella Coola by 11:00 am, in order to avoid winds from the Burke Channel - this, too, points to the need for fast boats. There are some closer attractions, however, such as the Tallio Cannery or the Tallio hotsprings that could be destinations for a day trip from Bella Coola.

On the outer Mid Coast, there are shorter travel distances to the many coastal attractions, and boats can generally hug the shoreline. Thus smaller or larger boats can be used to provide marine cruises. The shoreline of the Mid Coast is a beautiful and mystical place, however a marine cruise should intersperse shoreline viewing with some points of interest - historical, wildlife or cultural - to develop a really good marine product.

Most suitable landscape for a circle cruise

- Vicinity of Bella Bella: Distinguished by over 4,000 square kilometers of islands. The scenery is dominated by an expanse of green on extensive low elevation slopes and rocky shoreline. The scenery is repeatable but interesting features such as the numerous islands, lagoons, reversing tidal rapids, beaches, tombolos, intricate network of coves, inlets, and channels, comprise the nooks and crannies of the coast deepen the mystery and heighten the interest. With care, seal haul outs, bird rookeries, and assured marine mammal sightings further enhance a tour product. The communities of Bella Bella and Shearwater provide a variety of services and are close to the optimal features. A short two-hour run is feasible. Access to inside and open waters offer different options during windy days. Kayak motherships provide overnight opportunities for the many kayakers venturing in the region.
- Less suitable are Swindle and Prince Islands: The distance of optimal features on the west coast from Klemtu and Bella Bella require time to access. Suitable for long day or multi-day cruises in conjunction with Laredo Inlet.
- Spiller / Ocean Falls is close to the community of Bella Bella and Ocean Falls. Spiller Channel is a medium length channel that leads to Ellerslie Lake, a large lake ringed by towering mountains, high granite bluffs and sandy beaches (a separate cruise would be required to enjoy the beauty of this large lake). The lake is separated from the ocean by a short waterfall that may allow a small boat to be hauled over. Ocean Falls is a community that has considerable interpretative qualities to be linked to a circle tour from Bella Bella or as part of a linear cruise between Bella Bella and Bella Coola.

- Roscoe Inlet is a small fiord with very high scenic, historical and natural values and is a short distance from a community (Bella Bella). It is highly suitable for a circle cruise from Bella Bella and there is an opportunity to link the cruise to a road tour to Ocean Falls and to nature and cultural interpretation. Large trees amongst old growth provides an opportunity for a canopy walk.
- Namu / Dawsons Landing: Between Namu and Dawsons Landing are opportunities for the exploration of bays in which to shelter, the potential observation of grizzly bears in Koeye River , and the mystery of Fish Egg Inlet and Elizabeth Lagoon. Islands groupings at the mouth of Rivers Inlet can be easily discovered. The village of Namu offers a wide range of services and provides interpretive opportunities for both the First Nations and the canneries. This area is only suitable for a long day or multi-day cruise from Bella Bella or Rivers Inlet.
- The Smith area includes the open seas, rugged shores and beaches of Cape Caution to the south and the long narrow inlets and rocky shores of Smith Sound. Grey whales are known to frequent the waters off Cape Caution. On a fast boat, this is a half day opportunity from Rivers Inlet. Bella Coola to Tallheo Hotsprings offers a short circle tour linked the hotsprings and First Nations interpretation. Former longhouse site

Extensive multi-day or long day circle tours

- Fiordland -Roderick is an area renowned for the towering mountains and high, steep cliffs, particularly within Fiordland Provincial Park. The cliffs extend to parts of Roderick, Pooley and Dowager Islands. Many sections are a distance from the communities of Bella Bella and Klemtu. Muti-day opportunities suited for the kayak mothership product.
- Oweekeno Lake is a long scenic lake flanked by steep slopes. A hotspring is situated at Shewahant River on the north end. A trip to the hotsprings (limited development) requires the vessel be for lake use only and be linked to 4 wheel drive. The river valleys such as the Chuckwalla, the Kilbella have high wildlife values with an emphasis on elk. These valleys can provide a short circle tour from Oweekeno or Dawson's Landing. Timber harvesting has affected the visuals in these valleys as it has the upper Oweekeno Lake. There is a high potential for grizzly viewing close to Oweekeno. The Rivers Inlet lodges can take advantage of these opportunities.

Linear marine cruises

- Smith provides opportunities for one form of linear marine cruise. This is linked to long range travel from the south. All these vessels will pass outside or will enter Smith Sound. There are a number of anchorage, the best known are Jones Cove, Takush Harbour, Anchor Bight within Smith Inlet and Milbrook Cove (and the site of an old cannery) to the northwest. These are important anchorages for those cruising past Cape Caution.
- The Dean Channel and Burke -Bentinck Channels are surrounded by towering mountain ranges with rock outcroppings and bluffs that slope directly into the channel. The outcomes are highly scenic channels suitable for linear tours. The Dean and South Bentinck have hotsprings that are suitable for a "hotspring " marine cruise (limited numbers of bathers in the hotsprings). These channels link Bella Coola to other communities including Bella Bella.

- The west coast of Princess Royal Island is best suited for the linear cruise or multi-day circle tour. Dominated by low to mid-elevation mountains, deep inlets and rocky shores, the scenery is repeatable elsewhere. The section is distant from any communities. The cruise ships pass through Laredo Channel on their way to Alaska. Circle cruise opportunities may be linked to the lodges.
- Butedale to Laredo Inlet and the Inside Passage are very scenic. The Inside passage is characterized by an extensive carpet of green forest on steep slopes. There are few bays. One such place, Butedale, was a large cannery that closed in the 1950s but was still maintained until the late 1980s. Today it is semi-abandoned with the remaining buildings in various states of disrepair. Butedale is best reached from the community of Hartley Bay. Laredo Inlet has a diverse landscape with a wide range of relief and steepness of slope. It contains eight identified anchorages. Kermode bear sightings although rare, are highly desired. Multi-day circle tour opportunities can be linked to Laredo Inlet. Linear cruises are linked to the protected waters of the Inside Passage.

The marine cruise can be linked to the culture and heritage of the region through interpretation and awareness building. The Heiltsuk, Kitasoo, Nuxalk and Owekeeno First Nations people have historically derived their sustenance from the bounty the land and the rich marine resources. The richness of the land allowed time for arts and ritual. The First Nations continued presence as a people and the subtle historical evidence of their past heightens the feeling of mystery and wonder for the recreationist along the coastline. Later migrations of people include Alexander Mackenzie who reached the Pacific Ocean in 1793. His arrival to the Pacific shore was preceded by explorers in ships trading for furs. Later migrations included those who arrived to exploit and process the natural resources. Evidence can be seen in abandoned canneries, settlements and timber harvesting.

6.5.2 Market, Economic and Social Assessment of Marine Cruising

Competition

A review of the recently updated tourism operator database for the Mid Coast shows that there are over 50 operators who offer saltwater or freshwater charters on or near the Mid Coast. However, in almost all cases, marine charters are provided as a secondary activity to fishing, or lodge stays. In the Mid Coast region, there appears to be few, or no, operators who offer exclusively a marine tour product.

Elsewhere on the BC Coast, there are many marine cruise operators, and the competition is stiff. Key pocket cruise areas on the West Coast are Vancouver Island, the Kitlope on the North Coast, the Haida Gwaii and the Alaska Panhandle. The Mid Coast has features that could support a variety of marine cruises of short or longer duration, but this sector of tourism has not yet been developed.

Market Demand

Pocket marine cruises represent a promising tourism development opportunity, particularly for the outer coast. Pocket cruise vessels are small, and generally used for tours with an educational or sightseeing focus. These cruises emphasize wildlife, history, cultures and hotsprings and are best marketed to travellers seeking the adventure cruise or yacht-like luxury cruise niche.

The dramatic growth of the Alaskan cruise industry in the past decade has heightened interest in the BC Coast, both in the domestic and international markets. The attractions and unique qualities of the coast have also been put under the spotlight through the media and internet campaignsfor the Great Bear Rainforest by environmental interests such as the Sierra Club. While this poses challenges for the logging industry, such attention can be regarded as a benefit to tourism.

A 1995 survey carried out in seven major cities of North America shows that there is a significant market demand for a product that combines nature, adventure and culture within BC or Alberta. For these cities alone, it was estimated that potential demand for such a product ranges between 1.6 to 3.2 million visitors. The segment of this market that would be drawn to a pocket-type marine cruise is that which is more well-traveled, and in a mid-to-high income bracket. Those most likely to seek a pocket marine cruise are generally younger than travellers who frequents the major cruise ships, and generally seek new and interesting ports-of-call and experiences.

Another government survey carried out by telephone in California, Washington and British Columbia in 1990 showed that more than half the respondents have an interest in small ship cruising in BC. Based on the survey results in 1990, it was estimated at the time that there was a market of 4.9 million passengers for such an experience and a high potential for small ship cruising in BC. This number has likely increased during the past decade, as British Columbia's international profile grows. These travellers are willing to pay a premium for the kind of wilderness and learning experience that can be provided by a pocket cruise. Some key market characteristics identified in this survey are as follows.

- Over 90 percent of the market were from California and Washington, compared with 9 percent from BC. This points to the strong international appeal of cruise ship tours.
- The itinerary and destination are more important than the ship features, although comfort and fine dining are important ship features.
- The greatest interest lies in observing scenery and wildlife, participating in outdoor activities and seeing many ports-of-call.

The aging of the Baby Boom generation coupled with a corresponding increase in disposable income will continue to fuel the growing market for pocket cruises, which mixes the elements of wilderness experience, learning, low stress activities, and comfort.

Land Use Impacts and Issues for Marine Cruising

Existing Recreation Uses

Marine cruising can be a complement to other recreation uses, such as kayaking, fishing or lodge accommodation. It is generally compatible with all other tourism and recreation activities on the Mid Coast, both current and planned.

Other Land Uses

Like ocean kayaking, marine cruising could conflict with First Nations traditional use, and forestry use. With unlimited access to shoreline, cruise operators need to be educated about and respectful of historical and traditional use sites. This means prior consultation with local communities before establishing a route.

Visual quality is also an important consideration. Harvesting carried out within view of the shoreline or at overnight usage areas must be planned to preserve the sight lines, or shoreline recreational use will be negatively affected. Good communication must therefore be sustained between forestry and tourism operators.

Community Use or Planning

Same as ocean kayaking.

Local Employment Impact

A frequent criticism of the Alaskan cruise ship industry is that very little economic activity is generated locally, as all the vessels are foreign owned and crewed. Supplies are purchased in Vancouver or outside of their area of operation. One of the greatest appeals of a locally-based pocket cruise industry is the potential for direct, local economic benefits.

Cruise operations generate employment on board, at the point where the vessel takes on supplies, and possibly at the ports-of-call. Depending on the size of the operation, a locally-based pocket cruise would generate both direct and indirect employment on the Mid Coast. Direct employment would be that related to the operation - crew, guide, marketing/booking representative. Indirect employment and earnings would be generated in obtaining supplies and services for the ship, as well as maintenance, repairs, etc. Employment would be largely during the summer months.

Regulatory or Crown Tenure Requirements

No tenure is required if a ship is only anchoring, and no one is going ashore. However, if a pocket cruise itinerary makes frequent use of a specific area of Crown land as part of its tour (i.e., passengers are going ashore), then a permit or tenure from BC Assets and Land Corporation will be required.

The Department of Fisheries and Oceans has brought in new regulations for touring vessels that are over 5 tonnes or 8.5 meters in length. Existing vessels of this size or larger engaged in tourism activities may need to undergo upgrading and operators may be required to undertake specific training.

Level of Community Support

Same as ocean kayaking.

Infrastructure Requirements

The primary investment is a boat suitable for marine viewing. The boat can range in size, although smaller boats (28 or 32 feet in length) are fastest. Aluminum or fibreglass-hulled transport boats with passenger seats are suitable, as are fishing boats (possibly retrofitted to accommodate passengers). For tours that may involve an overnight stay, a boat with a cabin is desirable. However, in some cases boats with cabins are not necessarily the most suitable for viewing.

Land-based amenities such as docks or berthing facilities are already available in the various communities of the Mid Coast. Construction of these amenities may be required at undeveloped landing sites. An alternative is a series of mooring buoys and a pulley system for bring boats ashore.

Capital Requirements

The required initial investment for a marine cruise vessel varies according to ship size and features. Where there is already a boat available (e.g., fishing boat), some expenditure may be required for upgrades or conversion to a tour boat. Where a new boat must be purchased, capital requirements are relatively high.

Table 6.5-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Marine Cruise Product have been identified as *polygons* on the map and are described in Table 6.5-3.

Table 6.5-2: PRODUCT ANALYSIS TABLE: MARINE CRUISING

Unit Name/Number		Outer Coast (1)	Fiords & Lakes(2)	Channels (3)	Oweekeno Lake (4)	Princess Royal Island (6)
Resource Criteria						
Uniqueness of Key Features	Setting	High	High	High	Medium	High
	Scenic landscapes	Medium	High	High	High	High
	Wildlife uniqueness /assured sightings	High/Medium	Medium/Low	High/Low	High/Low	High/Low
Supportive Resources	Anchorage	Medium	Low	Low	Low	Medium
	Significant features	Medium	High	High	High (Hotspring)	Medium
	Post contact historical evidence	Medium	Low	Low	Low	Medium
	Physical evidence of First Nations	Medium	Medium	Low	Medium	Low
Existence of Supportive Infrastructure		Medium	Medium	Low	Low	Medium
Associated Products		Nature Observation, Destination Lodges, Culture/Heritage, Ocean Kayaking				
Significance of Associated Products		High	High	High	High	High
Access to Sub Unit Area		High	High	High	High	High
Access from Staging Area to Resource		High	Medium	Medium	Medium	Medium
Prime Season		Late Spring to Fall	Late Spring to Fall	Late Spring to Fall	Late Spring to Fall	Late Spring to Fall

Resource Discussion	- Bella Bella is well situated as a staging area for circle tours. Proximity to features and opportunities to enter different areas in response to the winds. - Cruises between Rivers Inlet, Koeye Namu and Bella Bella provide an extensive linear tour allow for opportunities.	- Fiordland contains some of the most scenic landscapes of the coast. Suitable for multi-day pocket cruise. - Scenic Roscoe Inlet provides an opportunity for heritage and nature observation. - Possible link to Ocean Falls by road.	Dean and Burke Channels are very scenic. The Dean includes Ocean Falls, hotsprings, and historical plaque. Linear route between Bella Bella and Bella Coola. Long distances limit circle tours to Tallheo Hotspring from Bella Coola.	- Oweekeno Lake requires a separate vessel. A visit to the hotspring requires road transport. - A short cruise between Rivers Inlet to Oweekeno link to nature observation including a visit to the adjoining valleys. - Timber harvesting has impacted scenic values in many areas.	The east side of Princess Royal is scenic but contains few diversions other than Butedale. Laredo Inlet has the highest cruise opportunity with the possibility of observing a Kermode bear and the availability of 8 anchorages.
Communities Most Able to Benefit	Bella Bella, Klemtu, Shearwater, Dawsons Landing	Bella Bella, Shearwater, Ocean Falls	Bella Coola, Bella Bella, Ocean Falls, Namu	Rivers Inlet, Oweekeno	Klemtu, Hartley Bay

Market, Economic and Social Criteria						
Unit Name/Number		**Outer Coast (1)**	**Fiords & Lakes(2)**	**Channels (3)**	**Oweekeno Lake (4)**	**Pr. Royal Isalnd (6)**
Level of Competition		- regional: low to medium most marine cruises part of another tourism package provincial: high international: medium				
Market Demand Potential		- BC, regional US and international: high				
Impact/Conflict	Existing Recreation Use	Medium	Low	Low	Low	Low
	Other Land Uses	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry	- Medium to high regarding First Nations cultural sites - Low to medium regarding forestry
	Community Use or Plans	- fits with local tourism development initiatives of the Heiltsuk - Kitasoo: unknown - Oweekeno: unknown	- fits with local tourism development initiatives of the Heiltsuk - Ocean Falls and Kitasoo: unknown	- fits with local tourism development initiatives of the Heiltsuk	- Oweekeno: unknown	- Kitasoo: unkown
Local Employment Impacts		Low to medium - crew, guide, marketing/booking rep; indirect employment in supplies, services, repairs, etc.				
Regulatory or Crown Tenure Requirements		- no tenure required if just anchoring - tenure or permit may be required if pocket cruise frequently utilizes specific area (e.g., hotsprings) - new DFO regulations for ships 8.5 meters or larger				
Level of Community Support		- positive support by Heiltsuk if initiative is locally based - Kitasoo – unknown - Oweekeno - unknown	- positive support if initiative is locally based	- positive support by Heiltsuk if initiative is locally based - Kitasoo – unknown - Oweekeno - unknown	- unknown	- unknown
Infrastructure Requirements		- purchase of new boats, or upgrade of existing; where docks/berths unavailable, these may need to be constructed, or mooring buoys and pulley system for boats				
General Capital Requirements		- Medium to high				
POLYGONS EXHIBITING HIGHEST POTENTIAL		**3,4**	**2**			**1**

Refer to Table 6.1-1 for definition of foregoing criteria. The highest potential polygons are described as follows.

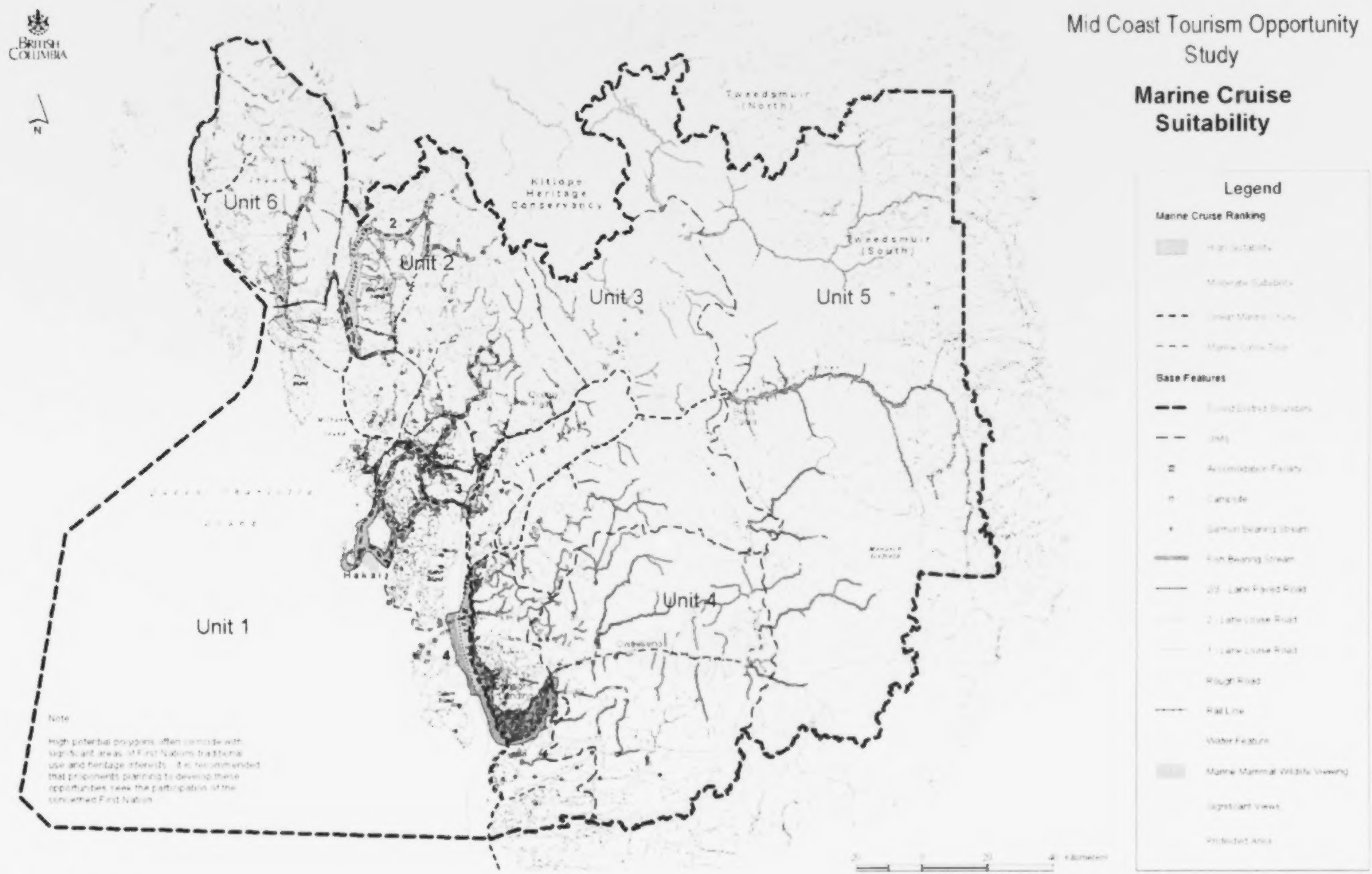
Table 6.5-3: Descriptions of Highest Potential Polygons for the Marine Cruising Product

Polygon Number	Description of Polygon
1	Focus: Laredo Inlet Staging Area:: Klemtu The high interest in the "Great Bear Rainforest" may inspire tourists to view Laredo Inlet and the possibility of seeing a Kermode bear. The cruise will bring tourists through narrow passages from Klemtu to relative shelter and cobble beach of Kitasu Bay and into the varied landscape of Laredo Inlet. Anchorages within the inlet provide overnight opportunities. Marine Cruising associated product: Ocean kayaking (and mothership opportunities), hiking, Nature Observation, Cultural Heritage Interpretation.
2	Focus: Fiordland Recreation Areas and Roderick Island Staging Area: Klemtu Circle cruise from Kemtu along the Inside Passage to Fiordland provides the recreationist with a variety of settings from narrow channels to deep cliff flanked fiords. Marine Cruising associated product: Ocean kayaking (and mothership opportunities), hiking, Nature Observation, Cultural Heritage Interpretation.
3	Focus: Outercoast in the vicinity of Bella Bella including Roscoe Inlet and Codville Lagoon. Staging Area: Bella Bella From the fiord setting of Roscoe Inlet, with high cliffs and very high First Nations values to the rich waters of Fitz Hugh sound and the Codville Lagoon to the rugged and mysterious coastlines of the outer coast (and the subtle First Nations values); there are a variety of circle tours that a marine cruise can undertake. Potential for viewing marine mammals. Marine Cruising associated product: Ocean kayaking (and mothership opportunities), hiking, Nature Observation, Cultural Heritage Interpretation.
4	Focus: Fitz Hugh Sound- from Koeye River to Rivers Inlet Staging Area: Dawsons Landing A cruise can link the potential grizzly viewing of the Koeye, to the mysterious Fish Egg Inlet and Lagoon to the islands at the mouth of Rivers Inlet. A changing and natural landscape. Marine Cruising associated product: Ocean kayaking (and mothership opportunities), hiking, Nature Observation, Cultural Heritage Interpretation.

Shearwater Marina: photo by Warren Fox

Mid Coast Tourism Opportunity Study

Marine Cruise Suitability


BRITISH COLUMBIA
N
Unit 1
Unit 2
Unit 3
Unit 4
Unit 5
Unit 6
1
2
3
4
Tweedsmuir (North)
Kitlope Heritage Conservancy
Tweedsmuir (South)
Queen Charlotte Sound
Hakai
Legend
Marine Cruise Ranking
High Suitability
Moderate Suitability
Base Features
Forest District Boundary
Units
Accommodation Facility
Campsite
Salmon Bearing Stream
Fish Bearing Stream
2/3 - Lane Paved Road
2 - Lane Loose Road
1 - Lane Loose Road
Rough Road
Rail Line
Water Feature
Marine Mammal Wildlife Viewing
Significant Views
Protected Area
20 0 20 40 Kilometers

Note

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

6.6 Road Touring

6.6.1 Resource Assessment

Discussion

Road tours are guided tours that take place on paved or gravel roads. They include the use of buses, mini buses as well as motorcycles. For gravel roads, comfortably and safely equipped large Sport Utility Vehicles are preferred. Road tours require high scenic values and corresponding viewpoints and points of interest. Tours can be linked to a destination with an outstanding feature, lodge, community or as part of a greater regional / provincial tour. Tours can be linear or circle. A tour can be part of a marine cruise or rail tour.

Road tours are ideal for those individuals seeking an adventure in safety and comfort and for those who do not choose or are unable to take one of their own vehicles.

Table 6.6-1: Regional SWOT Analysis for Road Touring

Strength	Destination feature (including the "Hill"), linkage to BC Ferries and the Chilcotin, infrastructure and community support, growing demand. Logging roads that lead to tourism features.
Weakness	Limited roads, road deactivation (Forest Service roads and Forest Company licensed roads), road, trail and site maintenance, lack of designated areas, safety concerns on active logging roads and the "Hill", scheduling with BC Ferries. Lack of roadside attractions and interpretive documentation.
Opportunity	Circle tour opportunities (local and regional), linkages with other tour types (marine and air), nature and cultural interpretive tours, linkages with other activities (hiking, air tour)
Threats	Conflict with sensitive wildlife habitats, high operating costs, competition.

Road Tours and the Mid Coast

The Mid-Coast contains a single paved road suitable for this product (Highway 20 to Williams Lake) and a number of gravel roads providing access to high value features. The success of the product is linked to the BC Ferry route and the promotion of the natural beauties of British Columbia and the region.

Paved road tours along Highway 20 can link Bella Coola to the Chilcotin plateau and Williams Lake. A significant section of Highway 20 is the "Hill", a single lane dirt road wedged between sheer wall and cliff with 18 percent grade switchbacks and no guardrails to keep drivers from sliding off. There are pull-overs along this stretch to allow room for large transport trucks to pass and for drivers to cool their brakes The road winds over Heckman Pass and descends to the Bella Coola Valley for 9 kilometers. Completed in 1953, it was built by the resolve of the community to link with the rest of the Province.

A number of paved road tours can be developed within the Bella Coola Valley including:

- a *provincial* circle tour from Vancouver that includes a marine cruise (using a private vessel or the BC Ferry route from Port Hardy), a road tour between Bella Coola and Williams Lake (includes the Bella Coola Valley and the Chilcotin), and rail or road tour from Williams Lake to points beyond;

- a *regional* tour linking Williams Lake, the Chilcotin and Bella Coola (can be part of a provincial tour package);

- a *local* valley tour to the thrills of the "Hill", the grizzly viewing potential around Tweedsmuir Lodge and stops along the Highway to take in local features. There is the potential for linking a float down the Bella Coola River from the Atnarko River.

Gravel road tours can be linked to the many Forest Service roads within the valleys that merge into the Bella Coola watershed. The tours can include forestry practices interpretation of past and present harvesting techniques and forest practices. The most notable tours include the following.

- The 24 kilometer Forest Service road along the Nusatsum River to Odegaard Falls and Nusatsum Lake. Odegaard Falls is a fine destination for picnics or hiking, and offers a view of the falls, which cascade about 200 metres down into the East Nusatsum Valley. Trailhead for the Ape Lake Trail and trail to view of Purgatory Mountain (part of the Monarch Icefields).

- The Cacoohtin road provides quick access to a small glacier. Sallompt provides access to lost lake. Shootha accesses three trails.

- In Tweedsmuir Park, a tour along the Atnarko River coupled with a hike towards the 260-meter Hunlen Falls.

Formerly, the Clayton Creek Forest Service road from the estuary of Bella Coola to the lookout in the vicinity of Blue Jay Lake provided excellent viewing opportunties. However, the road to Larso Bay and the "Big Cedar Tree (a five meters wide red cedar), have been decommissioned and due to high risks will not be reopen. Trails from Jay Lake provide access to rolling alpine.

Forest Service roads are subject to closures and consideration for this possibility must be accounted for.

The road tour can be linked to the culture and heritage of the Bella Coola Valley. The Nuxalk people have historically derived their sustenance from the bounty the land and the rich marine resources and trade was an important component of life. Trade routes between the coast and the interior have a record of almost 6,000 years of use. The richness of the land and trade allowed time for arts and ritual. The Nuxalk continued presence as a people and the subtle, sometimes obvious historical evidence of their past heightens the feeling of mystery and wonder for the recreationist along the Bella Coola Valley. Later migrations of people include Alexander Mackenzie who utilized the Nuxalk-Carrier grease trail to reach the Pacific Ocean in 1793, travelling through the Bella Coola Valley. Later migrations include the 120 Norwegian settlers who arrived and settled in the Bella Colla Valley in 1894 following pastor Christian Saugstad of the Lutheran Free Church to what he called 'New Norway'. Later migrations included those who arrived to harvest and process the natural resources. Evidence can be seen in settlements and timber harvesting. There are education and interpretive opportunities that can only enhance the road tour product.

6.6.2 Market, Economic and Social Assessment of Road Touring

Competition

At least ten bus tour companies regularly travel to Bella Coola during the summer and early fall months. Some visit Bella Coola once or twice per season, while others arrive five or six times over the season. Most of these companies use large, conventional buses that transport from 32 to 40 passengers, however there is a small but growing number of tours that use smaller vehicles, with capacity ranging from 6 to 12 passengers.

The bus tours originate in Vancouver, Victoria, Calgary, Seattle, Arizona, Kamloops and other cities, and are generally on a circle trip through the Chilcotin, Bella Coola Valley and Vancouver Island. In many cases, tour buses travel west-bound, stay one or two nights in Bella Coola, and leave on the Monday morning ferry. This concentration of traffic in Bella Coola on weekends occasionally strains the capacity of the hotels. However, at least two or three tours are now expected to arrive by ferry on different days, thus diverting some traffic away from the weekends.

During their stay in Bella Coola, bus tour passengers spend time sightseeing, engaging in recreational activities such as wildlife viewing and photography, and shopping. Key attractions include the Bella Coola townsite, the museum, the heritage house, local falls, the farmers market, Walker Island, a fish hatchery and church attendance. Most of the tours employ locally-based step on guides to provide interpretation and historical information.

The volume of conventional bus tours each season is growing at a reasonable rate. Even better growth is expected for smaller tours, where visitors fly into the area to engage in specific activities. For example:

- Natural Habitat Adventures (a tour company based in Colorado) provides six day tours to visitors who arrive by airplane. A mini-bus or van transports visitors from the airport to Tweedsmuir Lodge, and provides short road trips to the Atnarko River, grizzly viewing sites, and the Bella Coola village. Linkages with a helicopter tour or boat trip to Alexander Mackenzie Rock are also offering.

- Elder Hostel has offered three packages which include the Bella Coola Valley during the past few years. One of these included a rail trip to Williams Lake, transportation by conventional bus to Bella Coola and then the usage of small local buses during their stay in Bella Coola. The visitors then flew back to Vancouver.

- Presently, there are no locally-based road tours between Bella Coola and Williams Lake, although there have been two attempts to offer this kind of tour in the past. This could represent an important opportunity in the local tourism industry. Many through-travellers during the summer months would like to learn more about Bella Coola, and a short road tour (say, of a half day duration) would give them the means to do so. This would prove to be another way of extending visitors' stays. A representative of Visitor Information in Williams Lake points out that there is strong latent demand for this type of product. The key challenge is to sustain a new operation long enough to build ridership and profitability.

Market Demand

Touring comprises a major share of the North American tourism market. A survey carried out in several US cities in 1999 showed that 35 percent of travellers cited touring as a key motivation for travelling. Touring can include touring small towns and villages, taking driving tours, visiting large cities, visiting historic sites, visiting museums, galleries and cultural sites, and parks. Altogether this segment accounts for 9.7 million potential visitors in the US.

The touring market in US cities tends to be characterized as follows:

- more than half are female;
- less likely to have children under 18 in their household (30 percent);
- 13 percent between ages of 65 and 74;
- higher education attainment.

- Bus tours also appeal to the "mature" segment of the tourism population. This is defined as travellers between the ages of 55 and 74 with annual household incomes over US$50,000. Mature travellers generally do not have children, and are the most likely to be married (75 percent). The Pricewaterhouse Coopers survey results show that a high proportion of "mature tourists" have a preference for visiting Canada.

Travelers are drawn to bus tours for a number of reasons. Tours provide a comfortable means of transportation, as well as safety and variety. They can provide passengers with culture, education, adventure or romance. Generally speaking, tours provide enriching experiences to a market that is aging. They also offer a wide variety of links to other experiences, such as nature and wildlife observation, historical or cultural interpretation, and travel by other modes of transportation, such as boat or ferry.

The demand for road tours is growing worldwide. A Vancouver-based tourism broker indicates that the number of bus tours in BC has increased during the past five years. The clientele on larger, conventional buses tends to be older, particularly visitors from overseas. Tours by smaller buses or mini-vans attract younger tourists seeking a more active experience, possibly off-road.

Bus tour passengers generally prefer a circle route, and prefer not to repeat the same terrain. This explains the increase in bus tours travelling from Interior BC to the Mid Coast and the North Island.

Land Use and Planning Impacts

Existing Recreation Uses

No conflict with existing recreation uses is likely.

Other Land Uses

Off-road tours depend on the availability of Forest Services roads. As it is Ministry of Forests' policy to decommission forestry roads after a certain length of time, it could reduce the number of options for off-road tours. Harvest practices may also affect visual quality near paved or Forest Service roads. No other conflicts with land use is foreseen.

Community Use or Planning

The development of local road tours will generate economic benefits for the communities of the Bella Coola Valley because:

- all revenues would be realized at the local level; and,
- the tours will extend the average stay of some through-traffic, and likely generate more spending at local hotels, restaurants and stores.

Tours that impart historical or cultural education would have the added benefit of reinforcing awareness on the part of both native and non-native residents and visitors to the Mid Coast. Educating visitors about the past and present Bella Coola Valley will contribute to its image as an interesting and exciting place to experience.

Employment Impacts

Seasonal employment would be generated for drivers, guides, and in the areas of marketing and operations. Training will likely be required for drivers and guides, therefore contributing to the caliber of the local labour force.

Regulatory or Crown Tenure Requirements

Park use permits are required for operating an off-road tour in any provincial parks, such as Tweedsmuir. Liability insurance is also an important consideration.

Level of Community Support

Locally-based road tours comply with the economic development goals of the communities of the Bella Coola Valley. Most existing tours in the area have been initiated by non-locals, however it is recognized that these generate ongoing revenue for the business of the Bella Coola Valley. A venture initiated locally would very likely receive local support, although the inclusion of First Nations attractions must be treated with sensitivity and the full cooperation of the Nuxalk. As the Nuxalk are concerned with protecting their cultural and spiritual sites, and developing tourism at a different pace, a tour operator that plans to include any First Nations attractions or interpretation should work in close consultation with the Nuxalk.

Infrastructure Requirements

A bus, mini-van or possibly four wheel drive vehicle will be required for delivering road tours. If it is a circle tour that include water transportation, then a small craft that seats at least 5 or 6 passengers would be required.

General Capital Requirements

Typically, a moderate initial investment is required for a road tour venture. The cost of purchasing a van or mini-bus will likely range from at least $25,000 to $50,000, depending on whether it is new or used. It may be possible to make vehicle leasing arrangements instead of purchasing. It is also our understanding that there is a small fleet of school buses in Bella Coola that may be available for hire during the summer months, although this would depend on availability and school district policy.

Table 6.6-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Road Tour Product have been identified as *polygons* on the map and are described in Table 6.6-3.

Norwegian house in Bella Coola: photo by Warren Fox

Table 6.6-2: PRODUCT ANALYSIS TABLE: ROAD TOUR

Unit Name and Number		**Mountains & Trade Routes (5)**		
Resource Analysis		**Regional**	**Local - paved**	**Local - off road**
Uniqueness of Key Features	Setting	High	High	Medium
	Geography	Medium	High	High
	Wildlife	Medium	Medium	Medium
Supportive Resources	Scenic Values	High	High	High
	Number of roads	Low	Low	Low
	Significant features	Medium	Medium	High
Existence of Supportive Infrastructure (lookouts, stops)		Low	Low	Low
Associated Products		Cultural Observation, Nature Observation, Adventure, Marine Touring, Hiking		
Significance of Associated Products		High	High	High
Access to Sub Unit Area		High (BC Ferry and Highway 20)	High (BC Ferry and Highway 20)	High (BC Ferry and Highway 20)
Access from Staging Area to Optimal Features		High (Bella Coola) to Medium (Odegaard Falls and the Big Tree)	High (Bella Coola) to Medium (Odegaard Falls and the Big Tree)	High (Bella Coola) to Medium (Odegaard Falls and the Big Tree)
Prime Season		Spring, summer, fall	Spring, summer, fall	Spring, summer, fall
RESOURCE DISCUSSION		- the Road Tour along Highway 20 includes views of the high peaks that flank the valley, the Bella Coola River as it winds to the coast, the changing biogeoclimatic zones and the opportunity to see wildlife including grizzly bear. - Where there is the possibility for a circle tour, the opportunity should be undertaken. - Culture interpretation of the rich First Nations and immigrant histories. High quality features include the petroglyphs close to Bella Coola and the town of Bella Coola. - Nature interpretation associated with the vegetative changes, the relationship of the river to the grizzlies and salmonid species and rural relationships to the landscape.		
COMMUNITIES MOST ABLE TO BENEFIT		Bella Coola, Hagensborg		

Market, Economic and Social Criteria		
Level of Competition		- regional: low - provincial: medium international: high
Market Demand Potential		BC, regional and international: high
Impact/Conflict	Existing Recreation Use	Low
	Other Land Uses	- possible conflict with MoF decommissioning of roads, harvesting plans
	Community Use or Plans	- will complement other tourism initiatives, reinforce historical importance of Mid Coast
Local Employment Impacts		Low, seasonal; training requirements
Regulatory or Crown Tenure Requirements		Park use permits
Level of Community Support		Bella Coola: Positive; Nuxalk: unknown
Infrastructure Requirements		Vehicle, roads
General Capital Requirements		Moderate
POLYGONS WITH GREATEST POTENTIAL		1 - The Bella Coola Valley and Tweedsmuir exhibit the greatest potential for product development.

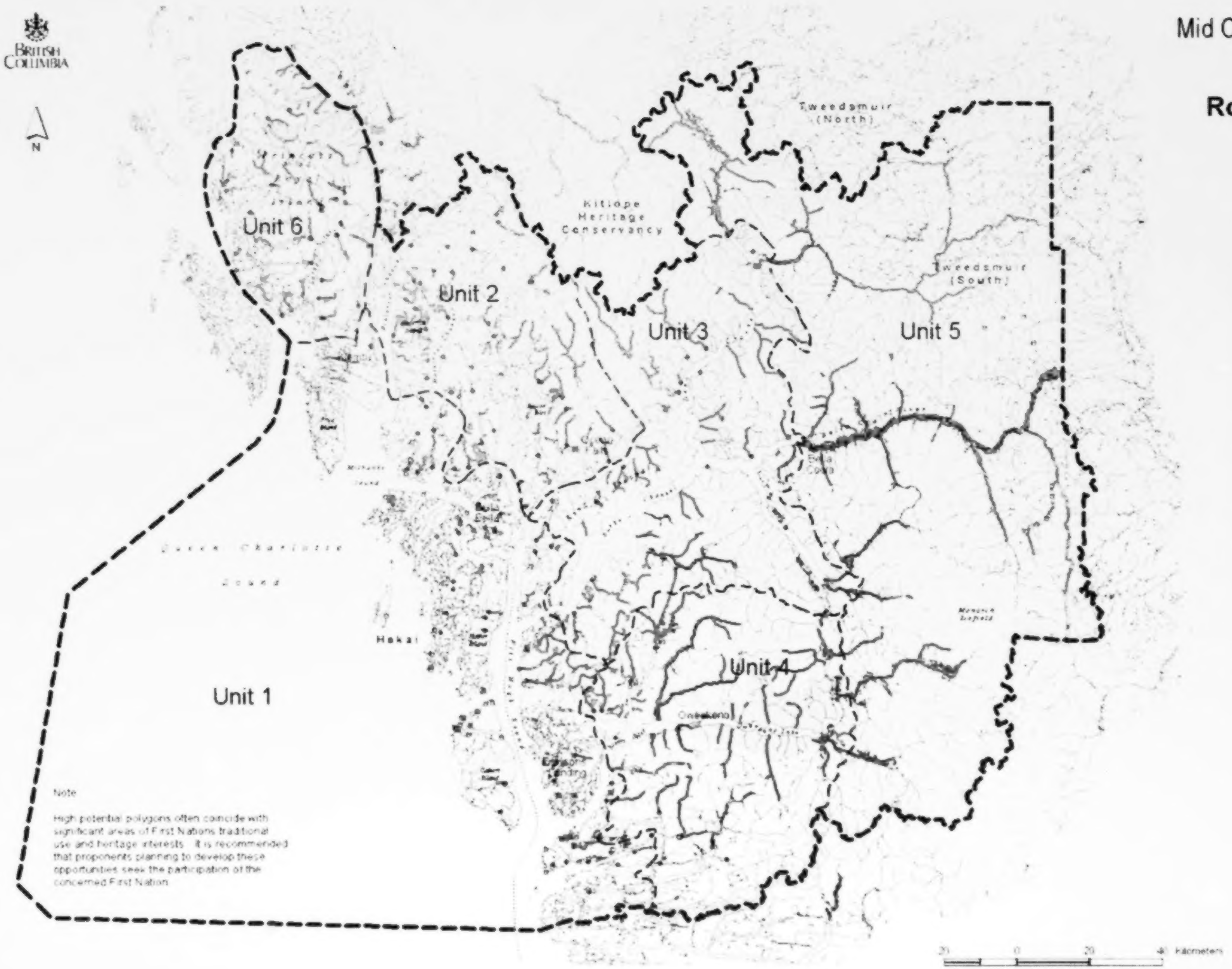
Refer to Table 6.1-1 for definition of foregoing criteria.

Table 6.6-3: Descriptions of Highest Potential Polygon for the Road Tour Product

Polygon Number	Description of Polygon
1	Focus: Highway 20 Staging Area:: Bella Coola Highway 20 travels through the spectacular scenery of the Bella Coola valley with glimpses of the river and the continual presence of high mountains and steep rock faces. The "Hill", an 18% section of road is a tribute to the determination of the residents of the Valley to connect to rest of BC - they built it themselves. Historical values mix with the scenic values. Complimenting the highway are the logging roads that lead to Odegaard Falls and the trailhead to Ape Lake (Nusatsum), to a Glacier (the Cacoohtin Creek) and the Atnarko Road towards the Hunlen Falls. Road Touring associated product:: Nature Observation, Cultural Heritage Interpretation, Hiking.

Mid Coast Tourism Opportunity Study

Road Tour Suitability


British Columbia
N
Unit 6
Unit 2
Kitlope Heritage Conservancy
Tweedsmuir (North)
Tweedsmuir (South)
Unit 3
Unit 5
Bella Coola
Queen Charlotte Sound
Hakai
Unit 1
Unit 4
Owikeno
20 0 20 40 Kilometers
Legend
Road Tour Ranking
High Suitability
Base Features
Forest District Boundary
Units
Accommodation Facility
Campsite
Salmon Bearing Stream
Fish Bearing Stream
2/3 - Lane Paved Road
2 - Lane Loose Road
1 - Lane Loose Road
Rough Road
Rail Line
Water Feature
Harvested Area
Significant Views
Protected Area

Note

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

6.7 Destination Lodge

*6.7.1 **Resource Assessment***

Description

A destination lodge or resort performs the function of a regional anchor that can support a variety of outdoor tourism products. Traditionally these activities have centered on fishing and hunting, but resorts are now focusing on non-consumptive activities such as nordic skiing, hiking, kayaking, wildlife viewing, cultural interpretation, exploring and full service spas to diversify their market niches. A recent trend is the shift towards specialization or theming where the lodge focuses on one or two non-traditional activities. To achieve the best return on the capital required to build a lodge facility, an entrepreneur may opt to develop activities that could draw clients in both the summer and winter seasons.

On the coast, the majority of lodges are non-moving vessels on the water. As well, there are a few on land and several large vessels that move to different locations. Access varies from fly-in or boat-in only (backcountry) to paved road (front country), and this typically depends on the market segment for which the lodge is intended. The facility can be rustic with only the most basic features, or offer full service amenities. Lodges offer private accommodation through separate rooms or cabins, as opposed to huts, which generally offer shared sleeping quarters. Operations can further diversify through offering meeting or conference rooms, allowing clients to mix business with pleasure.

Guests can participate in activities independently or through the services of a guide. The resort need not directly employ guides but could draw on the services of other local tourism operators with whom they maintain a working relationship. The existing lodges on the Mid Coast attract clients from the USA and Europe who expect a remote location with full services. Clients generally stay at a destination lodge for five or more days.

Regardless of the style of the facility and access considerations, destination lodges require scenic, natural appearing settings. The presence of significant features or a diversity of features within easy access augments the potential for lodge development, for example well-developed trail networks and nearby attractions such as nature observation platforms, developed hotsprings or other amenities. Lodge developments are most often situated near lakes or rivers or in coastal areas.

The importance of non-traditional activities to the lodges is expected to increase as the quality and quantity of the fish resource (primarily salmon) deteriorates and as federal regulations further restrict access to the resource. Facilities offering a broad range of activities have a greater potential to attract couples or families when only one member of the guest party intends to fish.

Table 6.7-1: Regional SWOT Analysis for Destination Lodges

Strengths	Sports fish, remoteness, scenery, high value features including hotsprings. Wildlife (bears and whales). First Nation culture
Weaknesses	High precipitation, poor scheduling of flights and cost to access region, competition among existing sport-fishing lodges, numerous sport fishing lodges in one location (Rivers Inlet), high start up and operating costs, government regulatory obstacles. Little or no relationship with local communities (with a few exceptions).
Opportunities	Diversification into other types of activities such as whale and wildlife watching, freshwater fishing, hiking, exploring, etc.; linkages to air and marine tours; soft adventure market niche seeking world class wilderness experience.
Threats	Land use uncertainties, increased use affecting "remote" experience, forest harvesting (with visual and environmental concerns), decline of the Pacific salmon stock.

Destination Lodges and the Mid Coast

Existing Opportunities and Locations: The predominant focus for existing lodges on the Mid Coast is sport fishing. The lodges are mainly located in sheltered bays and coves close to the prime salt water fishing locations. Concentrations of lodges can be found within Rivers Inlet. Other lodges include Pruth Bay, Koeye, Namu, Shearwater, Barnard Inlet and Surf Inlet. The Dean River has a lodge that is focused on the world famous Steelhead fishing. In the Bella Coola Valley at the edge of Tweedsmuir Provincial Park is a lodge that offers a variety of activities.

Future Opportunities: There is an opportunity on the Mid Coast for developing new lodges linked to the following:

- Hotsprings (there are four worth mentioning) - Tallheo, Sheemahant, Eucott and Nascall;
- First Nations culture - lodges providing cultural interpretation and exposition -- includes Roscoe Inlet, Koeye, Pruth Bay, Laredo Inlet and Cornwall Inlet in Princess Royal and other locations;
- Historic canneries such as Butedale, Tallheo and Namu have the history and structures that compliment a multi activity lodge; and,
- a combination of both hotsprings and First Nations interpretation (Tallheo and Sheemahant Hotsprings), among others.

In addition to developing non-conventional lodge facilities there are a number of opportunities for existing lodge operations. These include: facilities with increased diversification of activities (kayaking, air tours, wildlife viewing, hiking, nature interpretation, canopy walks, etc.), full service spas in a remote "natural" setting, and lodge to lodge tours by boat or plane – packaging a group of related but complementary facilities. Location is an important criterion and existing lodges which are not only close to the fish but to a range of suitable features, will have the greatest success. One supportive product that may be lodged based is air tours using helicopters. Helicopters can be used for scenic viewing, drop off at fishing spots, for hiking and for nature observation. On the Mid Coast, air tours are limited by the lack of scenic variety within a 60 km radius from any single point. There is one location where glaciers, fiords, lakes, rivers, coastal islands, white sand beaches, marine mammals and large land mammals can all be reached within a half hour and this is *Roscoe Inlet*. Such locations also exist in the Port McNeill Forest District.

The locations that have high potential for lodge development include:

- Rivers Inlet with access to fish, islands, lakes, river valleys, First Nations, and relative closeness to Cape Caution;
- Pruth Bay which provides access to the outer coast beaches and coast;
- Shearwater, Namu, Koeye and Barnard Inlet which are relatively close to significant features including scenic fish bearing lakes, rivers and creeks; and
- hotsprings-linked destination lodges that include Eucott, Nascall, Tallheo and Sheemahant. Lodge opportunities may be enhanced with First Nations culture interpretation and exposition, nature observation, helicopter tours and access for a variety of activities including fishing, skiing and touring.

6.7.2 Market, Economic and Social Assessment of Destination Lodges

Competition

There are over 50 destination lodges on the West Coast of BC and several more in neighbouring Alaska. Many of the destination lodges on the south coast of BC are successfully linked to a variety of adventure tourism products and target relatively new market niches (ie., storm watching). On the Mid Coast there are numerous lodges which cater primarily to the sport fishing industry. Approximately ten of these lodges are located in the Rivers Inlet area. Currently there are only three lodges in the Mid Coast that have a focus on activities other than sports fishing. However, several of these fishing lodges in the Mid Coast have started to explore associations with specific adventure tourism products.

Several First Nation communities on the coast are actively exploring destination lodges in association with the development of cultural and adventure tourism products. An entrepreneur considering a destination lodge would need to be aware of the complementary products offered by the larger kayaking companies who use pocket cruise ships or large sail boats to offer clients higher-end accommodation in the Mid Coast.

Market and demand

Destination lodges generally attract more affluent, seasoned travellers willing to pay for a unique outdoor experience combined with comfortable accommodation and high quality food and service. Adventure tourism activities such as wildlife and nature observation, heli-hiking, boating, freshwater fishing, cycling, kayaking and visiting historic or First Nation cultural sites are often associated with the destination lodge experience.

Research has shown that a significant component of the ecotourism market is attracted to smaller, intimate, adventure-type accommodations, including cabins and lodges.[1] As illustrated in Table 6.7-1, experienced ecotourists cite a strong preference for this type of accommodation.

Table 6.7-1: Accommodation Preferences of Ecotourists Interested in Visiting BC[2]

Accommodation Preferences	% General Ecotourists Interested in Visiting BC	% Experienced Ecotourists
Cabin	18	66
Lodge/Inn	16	60
Tent	22	58
Bed and Breakfast	6	55
Hotel/motel	55	41
RV	9	8

Typically visitors at a destination lodge stay a minimum of one week.

Currently, a small portion of the global tourism market visits British Columbia. The province's market share of world tourism has the potential to grow in the future, as tourists become more aware of the amenities British Columbia has to offer. As well, the demographics of the American travelling population is growing older and they are looking for more comfort oriented environments.[3] This will stimulate strong demand for the destination lodges product in BC in the coming years, as long as the destination lodge is able to ensure high quality accommodation, food and services on par with that offered in other countries more customarily known for their high-end lodge destinations.

Land Use and Planning Impacts

Existing Recreation Uses

Recreational use associated with natural physical features, such as hotsprings, are generally higher or focal points of local recreational activities. However, on the Mid Coast, with its small number of residents compared to elsewhere in the province, recreational use will typically be low to moderate. Before development, consultation with the neighbouring communities would be required to determine the acceptable proximity of the destination lodge from a significant local feature such as a hotspring.

---

[1] Pamela Wight and Associates. *Catalogue of Exemplary Practices in Adventure Travel and Ecotourism*, March 1999. Prepared on behalf of the Canadian Tourism Commission.

[2] Ibid.

[3] Canadian Tourism Commission, *American Travel in Canada – The Market to 2010*, May 1998.

Other Land Uses

For destination lodges, visual quality and wildlife impacts will be a critical consideration. Therefore, forest practices and viewscapes will need to be planned accordingly in the proximity of a destination lodge.

Destination lodge owners will also need to work with local First Nations to ensure current community uses and culturally sensitive sites are not disrupted. Typically, regionally significant sites in the Mid Coast also mark important traditional sites for the area's First Nations.

Community Use or Planning

The development of destination lodges fit with the tourism development objectives of local communities. First Nation communities in the Mid Coast are exploring or developing destination lodges in conjunction with expanding cultural interpretation opportunities and developing new adventure tourism products locally.

Environment

The development of a destination lodge will need to be carefully planned to mitigate environmental impacts. The destination lodge will create intensive use around a small area, which will likely have been remote and seen little human traffic. Issues associated with waste management and wildlife impacts will have to be reviewed prior to development.

Employment Impacts

The development of a destination lodge could generate a significant amount of jobs in local communities if the lodge owner makes local hiring a priority. A common criticism of many resort lodges on the west coast is that most of their labour, supplies and services are brought into the area from Vancouver or the US, and that very few economic benefits accrue locally. However, there are a growing number of operators who recognize the contribution that can be made by local workers, and the importance of local support and economic diversification. For example, Shearwater Marine Resort is a major employer locally.

A destination lodge will require a variety of skills and job classifications and as the trend to a more diversified and extended season continues there is the opportunity to create more permanent employment in the destination lodge sector.

Regulatory or Crown Tenure Requirements

The proponent of a new destination resort would be required to apply for a Commercial Recreation Intensive Use Site lease from BC Assets and Land Corporation. The lease would require a legal survey. Other government agencies may also require additional site assessment work prior to the finalization of the tenure.

Level of Community Support

Most communities in the Mid Coast are actively exploring the development of a destination lodge type opportunity to support their own tourism development objectives. New destination lodge development will need to work closely with area communities to ensure support.

Infrastructure Requirements

The infrastructure requirements for a destination resort will be extensive. In addition to the main accommodation building(s), a destination resort could require moorage facilities, helicopter pad or access road construction depending on the mode of transportation. Sewage and utilities would also need to be developed. It may also be necessary to construct trails to support ancillary activities.

General Capital Requirements

The capital requirements for a destination resort will be significant based on standards for other adventure tourism products in this report. Realistic capital requirements range, but it is realistic that such a development could cost upwards of several million dollars for a high-end development.

Table 6.7-3 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Destination Lodge Product have been identified as *polygons* on the map and are described in Table 6.7-4.

Table 6.7-3: PRODUCT ANALYSIS TABLE: DESTINATION LODGE

Unit Name and Number		Outer Coast (1)	Fiords & Lakes (2)	Channels (3)	Oweekeno (4)	Mountains and Trade Routes (5)	Princess Royal Island (6)
Resource Criteria							
Uniqueness of Key Features	Setting	Medium	High	High	High	High	High
	Geography	Medium	High	Medium	Medium	High	High
	Wildlife	Medium	Medium	Medium	Medium	Medium	Medium
Supportive Resources	Fish	High	High	Medium	Medium	High	High
	Significant feature	High	High	High	High	High	High
	Feature Diversity	High	High	Low	Low	High	High
	Suitable locations	High	High	Low	Low	Medium	High
Existence of Supportive Infrastructure		High	Low	Low	Low	High	Low
Associated Products		Salt water and freshwater fishing, Ocean kayaking, Marine Cruising, Air tours, Trail products, Nature Observation, Culture and Heritage, Spas, Rafting/drifting					
Significance of Associated Products		High	High	High	High	High	High
Access to Sub Unit Area		High	Medium	Medium	Low	High	Medium
Access from Staging Area to Resource		High	Low	Medium	Medium	Medium - High	Medium
Prime Season		Spring to Fall	Spring to Fall	Spring to Fall	Spring to Fall	Spring to Fall	Spring to Fall

RESOURCE DISCUSSION	- Rivers Inlet, Shearwater, Pruth Bay are close to a diversity of features - Koeye and Pruth Bay have interpretive First Nations opportunities - Butedale is fee simple and contains structures (in various states of disrepair)	- Roscoe Inlet has interpretive First Nations opportunities, scenic values, cluster of features. - Potential link to canopy walk amidst large trees. - Location provides the greatest feature diversity for air tours	- Hotsprings offer unique significant feature. Potential for link to First Nations cultural interpretation	- Potential for developing hotspring although visuals are a concern.	- Opportunities are linked to the valleys. Potential for an Adventure Resort in the Bella Coola Valley.	- Diversity of features and opportunities associated with the scenic lakes, Laredo and Cornwall Inlet
COMMUNITIES MOST ABLE TO BENEFIT	Bella Bella, Klemtu, Dawsons Landing	Bella Bella	Ocean Falls, Bella Coola, Bella Bella	Oweekeno, Dawsons Landing	Bella Coola	Klemtu, Hartley Bay

Market, Economic and Social Criteria							
Unit Name and Number		**Outer Coast (1)**	**Fiords & Lakes (2)**	**Channels (3)**	**Oweekeno (4)**	**Mountains and Trade Routes (5)**	**Princess Royal Island (6)**
Level of Competition		Moderate to High – several fishing lodges in the south	Moderate	Moderate	High – several fishing lodges in Rivers Inlet	Moderate to High, three lodges servicing current demand	Low to Moderate, one lodge soon to be operating in area.
		Competition is well established on Vancouver Island and southern coastal area with numerous adventure tourism focuses and products associated with destination lodges.					
Market Demand Potential		High – growing demand for destination lodge product.					
Impact/ Conflict	Existing Recreation Use	Low	Low	Low to Moderate	Low	Moderate	Moderate
	Other Land Uses	First Nation's cultural sites and traditional uses will need to be considered for specific sites before development of destination lodges.					
		Forestry use – low	Forestry use – high forestry values, minimal past harvesting activity.	Forestry use - low	Forestry use – medium to high.	Forestry use – medium to high	Forestry use – low
	Community Use or Plans	Klemtu First Nations exploring tourism opportunities.	Heiltsuk First Nations exploring tourism opportunities.	Unknown community interest.	Interest in area from Oweekeno First Nations.	Bella Coola Valley exploring opportunities	Of interest to Nuxalk First Nations.
	Environmental	Medium to High – building of lodge will represent intensive development in a small area, proper environmental planning will be critical to mitigating impacts.					
Local Employment Impacts		The employment effects associated with the development of a destination lodge would be significant and stable if the workers are hired locally.					
Regulatory or Crown Tenure Requirements		Would need to apply for a permit or tenure from BCAL.					

Level of Community Support	Several communities in the Mid Coast are currently exploring the development of their own destination lodge. Project developed with the community will be supported.					
Infrastructure Requirements	High in order to support a destination lodge in remote location, will also require development of some ancillary infrastructure as well					
General Capital Requirements	High					
POLYGONS EXHIBITING HIGHEST POTENTIAL	**3**	**2**	**5, 6**	**4**	**7**	**1**

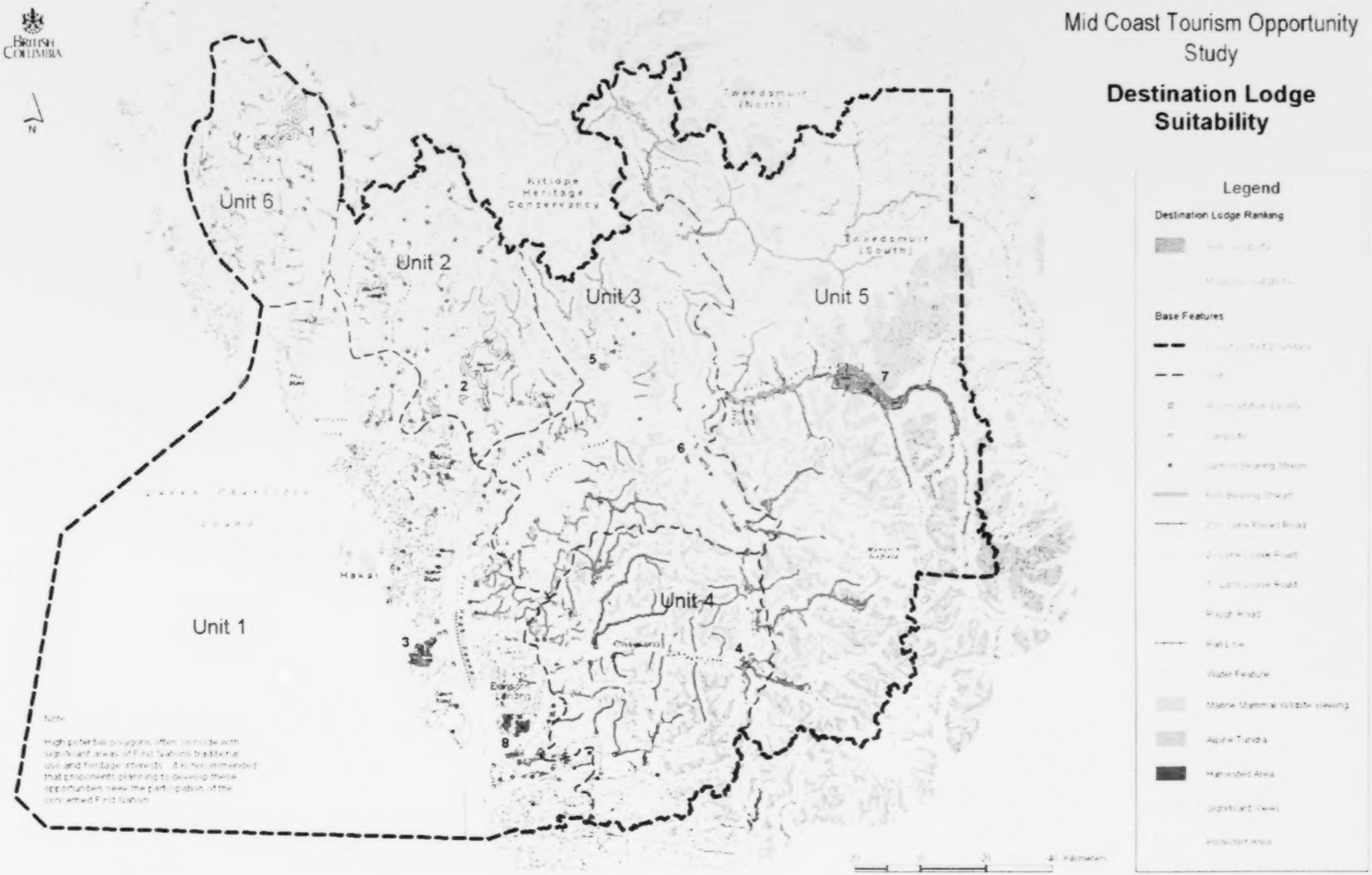
Refer to Table 6.1-1 for definition of foregoing criteria. See following page for definitions of polygons.

Table 6.7-4: Descriptions of Highest Potential Polygons for Destination Lodge Product

Polygon #	Polygon Description
1	Focus: Anchor Lake and Butedale Staging Area: Klemtu This lodge product would be associated with cultural heritage interpretation and exposition, fishing, nature observation, boating, air tours and hiking. High and diverse values heightened by the possible sightings of the Kermode bear. Butedale has existing heritage buildings and a still visible history related to the coast. Destination lodge associated product: Cultural Heritage Interpretation, Nature Observation Boating, Steelhead Fishing, Hiking
2	Focus: Roscoe Inlet Staging Area: Bella Bella A lodge can link to the rich Heiltsuk First Nation interpretive opportunities, local scenic values and cluster of features with a potential opportunity for a canopy walk amidst large trees. Helicopter link to this area provides access to high snow capped peaks, the outer coast, ocean and lake white sand beaches and fish bearing streams, rivers and lakes. Only high suitability location in the Mid-Coast with this potential. Destination lodge associated product: Cultural Heritage Interpretation, Nature Observation, Air Tour and Access, Ocean Kayaking, Marine Cruise, Hiking, potential skiing.
3	Focus: Pruth Bay and North Calvert Island Staging Area: Pruth Bay A lodge presently exists focused on fishing. Opportunities for diversification lie with Cultural Heritage interpretation, ocean kayaking and a shift to the open waters in the exposed west coast. Trails need to be constructed. Destination lodge associated product: Ocean Kayaking, Boating, Hiking.
4	Focus: Oweekeno Lake Staging Area: Oweekeno Scenic Oweekeno lake is close to Sheemahant hotspring which can be developed as a spa lodge with strong First Nations Heritage interpretation and exposition. Nature observation linked to the grizzly bear and salmon (with hopes that they return to their traditional stock levels). Timber harvesting has affected the viewscapes. Past and present forest harvesting practices including visual design, environmentally sensitive and other considerations can be explained. Access to the Monarch Icefield of unit 6 can be achieved by helicopter and increase the diversity of opportunities to includes touring and skiing. High Oweekeno First Nations interest. Destination lodge associated product: Specialized Spa, Air Tour And Access, Freshwater And Saltwater Fishing, Marine Cruising, Skiing, Mountaineering.
5	Focus: Eucott and Nascall Hotsprings Staging Area: Bella Coola or Ocean Falls These hotsprings are adjacent to scenic Dean Channel and the helicopter opportunities of: scenic and culturally rich Roscoe Inlet and Ellerslie Lake, the fishing potentials of the Fiords and Lakes Unit (2) and the ski opportunities associated with the glaciers and snow opportunities of the northern Mountain and Trade Routes Unit (5). Destination lodge associated product: :Specialized Spa, Air Tour And Access, Freshwater And Saltwater Fishing, Marine Cruising, Skiing, Mountaineering
6	Focus: Tallheo Hotsprings Staging Area: Bella Coola (Nuxalk) This hotspring has a small beach. Hotspring flow is suitable for a small lodge development. Destination lodge associated product: Cultural Heritage Interpretation, Marine Cruising
7	Focus: Bella Coola Adventure Lodge Staging Area: Bella Coola This product is focused on the Adventure Product associated with the surrounding mountains, cliffs and Icefields. Grizzly observation is an opportunity. That can be linked to drift tours down the Atnarko and Bella Coola Rivers. Destination lodge associated product: Air tour, Road Tour, River Drifting, Canoeing,

Mid Coast Tourism Opportunity Study

Destination Lodge Suitability


British Columbia
N
Unit 1
Unit 2
Unit 3
Unit 4
Unit 5
Unit 6
Kitlope Heritage Conservancy
Tweedsmuir (North)
Tweedsmuir (South)
Queen Charlotte Sound
Hakai
Dawsons Landing
1
2
3
4
5
6
7
8
20
0
20
40 Kilometers
Legend
Destination Lodge Ranking
High Suitability
Moderate Suitability
Base Features
Unit
Accommodation Facility
Campsite
Salmon Bearing Stream
Fish Bearing Stream
2+ Lane Paved Road
2+ Lane Loose Road
1 Lane Loose Road
Rough Road
Rail Line
Water Feature
Marine Mammal & Wildlife Viewing
Alpine Tundra
Harvested Area
Significant Views
Protected Area

Note

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

6.8 Hut-to-Hut System

6.8.1 Resource Assessment

Discussion

A hut-to-hut system is a series of linked hut accommodations, strategically situated at certain intervals to provide overnight accommodation for kayakers, boats, hikers or skiiers. Huts provide ecotourism recreationists (who generally engage in low impact, non-consumptive tourism) with a degree of comfort in chosen settings. Huts can provide a range of experiences from the rustic -- consisting of shelter with simple wooden bunks, a wood stove, firewood and an outhouse -- to the high end, where the comfort of the guest is paramount. The Hut system product provides the option of participants moving from one hut to another by water or land. The Hut system allows those who are less skilled or physically fit to appreciate the more remote wilderness and participate more fully in ecotourism. Ecotourism is a growing industry and is expected to continue to increase with environmental awareness.

There are a number of advantages associated with the hut system product:

- Huts allow recreationists a warm shelter and are well suited in this region of high precipitation.
- Huts provide camping opportunities in areas where there are shortages of level, dry ground; with buoy or dock facilities they allow recreational boaters an overnight stay in areas with limited anchorage.
- Huts can be placed away from environmentally and culturally sensitive areas.
- Huts allow for the greater safety of recreationists.
- Huts need not minimize the wilderness setting of an area if proper concealment within the forest is exercised.
- Huts systems allow communities to financially benefit from products that take place in remote settings.

Table 6.8-1: Regional SWOT Analysis for Hut Systems

Strength	Remoteness, scenery, high value recreation features, optimum topography, places recreationists away from culturally or environmentally sensitive locations, enhances recreation opportunities in an area, adjacency to communities, community support for locally-based initiatives, new training opportunities for local labour force
Weakness	Vandalism, repeatability of product potential along BC coast, lack of support infrastructures (trails), cost to access region, compliance and enforcement, challenges in obtaining financing, untested high-end product
Opportunity	Rustic to high end lake and marine hut systems. Linkage to high opportunity activity such as ocean kayaking or boating
Threats	Increased recreation use affecting "remote" experience, forest harvesting

Hut Systems and the Mid Coast

The topography and climate of the Mid Coast is well suited for this product. The outer coast includes large and small islands, beaches, coves, bays, and lagoons. There are also a number of lakes and rivers throughout the Forest District, and accessible sub-alpine/alpine areas close to Bella Coola. The marine hut system is especially promising on the outer coast.

On the Mid Coast, hut system opportunities are best associated with the following.

- Marine interphase features and associated kayaking, boating, hiking and wildlife/ nature viewing. Included here are opportunities associated with coastal trails.
- Lake features and associated freshwater sport fishing, canoeing, hiking and wildlife/ nature viewing.
- Due to high development and maintenance costs (for trails), there are minimal opportunities associated with sub-alpine/alpine features, trails and associated ski touring, hiking, mountaineering and wildlife/ nature viewing.

The hut system can be linked to the culture and heritage of the region. The Heiltsuk, Kitasoo, Nuxalk and Oweekeeno First Nations people have historically derived their sustenance from the bounty of the land and the rich marine resources. Trade was an important component of life and trade routes between the coast and the interior have a record of almost 6,000 years of use. The richness of the land allowed time for arts and ritual. The First Nations continued presence as a people and the subtle, sometimes obvious historical evidence of their past heightens the feeling of mystery and wonder for the recreationist along heritage trails or coastline. Later migrations of people include Alexander Mackenzie who utilized the Nuxalk grease trail to reach the Pacific Ocean in 1793. His arrivals to the shores of the Pacific was preceded by explorers in ships trading for furs. Later migrations include the Norwegian settlers and those who arrived to exploit and process the natural resources. Evidence can be seen in abandoned canneries, settlements and timber harvesting. There are educational and interpretive opportunities that can only enhance the hut system product.

Marine Interphase hut system

There are similarities in topography and climate to the other parts of the British Columbia Coast. The exceptions are the numerous archipelagos associated with the outer coast, the potential for circuit routes, the accessible remoteness of the region and the appeal it has to those seeking a natural, undeveloped environment. hut system development must not compromise this appeal and must ensure visual subtlety.

There are presently several huts in place on the outer Mid Coast, constructed by the Heiltsuk, but no hut system has yet been developed. In contrast, Alaska has developed marine huts that are solidly booked in the summer months. The success of the product in Alaska can spill over to the Mid Coast with added stimulus from the BC Ferry route and the promotion of the natural beauties of British Columbia and the region.

Key considerations regarding the Marine Interphase hut system are as follows.

- The product could be a major attraction to the Mid Coast. Modelled in part after the US Forest Service huts in Alaska, the huts could take advantage of the high quality features found on the outer coast including islands, beaches, open ocean and sheltered areas while addressing the shortage of suitable camping areas and extreme tides.
- Huts can be located away from culturally and environmentally sensitive areas yet linked to interpretive opportunities.
- Huts can be aligned in a linear pattern or be discretely grouped in locations where there is a significant recreation feature such as a beach or in locations close to the staging areas.
- Hut location can provide a circle route to and from the staging area. To allow for late arrivals, more intense clusters can be developed close to the gateway community or staging area. On the Mid Coast, arrivals and departures are determined by the timing of the ferry.
- Parties can be shuttled to staging areas (such as the Simonds group of islands) or directly to individual huts from the gateway communities.
- Huts can feature buoys or floating docks to allow small boaters and ocean kayakers overnight opportunities.
- Trail can be developed to link approachable leeward sides of an island or peninsula to a hut on the more dramatic windward side.

Lake hut systems

- This is similar to the Marine Interphase hut system.
- Lakes with outstanding scenery and the presence of beaches include Ellerslie, Anchor and Roderick.
- Lakes that are large enough to contain a string of huts include Anchor, Canoona, Butedale, Roderick, Elizabeth, Deer, Bear, Whallen, Koeye.
- There are opportunities for providing shelter along circuits (e.g., Anchor Lake - Bear Lake -Surf Inlet and Fish Egg Inlet - Elizabeth Lake - Hardy Inlet - Rivers Inlet to Dawsons Landing).
- Many of the lakes can only accommodate a single hut accessible by air.

Trail hut systems

- These are best located where there is the presence of an established trail and a reasonably close population.
- The hut systems can be clustered around outstanding features such as lakes, or can be aligned in a string to provide shelter intervals along a developed trail.
- Trail hut system opportunities can be linked to the heritage grease trails, the Alexander Mackenzie trail and to the long expansive beaches of the outer coast, particularly along the west coast of Calvert Island.
- Trail hut systems can be used in summer and winter for a variety of activities including hiking, ski touring and snowmobiling.
- Opportunities will be affected by cost of maintaining trails, repeatability elsewhere, high potential for vandalism, and difficulty in maintaining the site.

Management

- Huts can be located one or more kilometers apart, depending on feature suitability and management capability. Because of their remoteness, vandalism can be a problem.
- Bookings for huts can be made prior to the season. Hut locations can be posted on the internet or described in the brochures and elaborated on during the booking. A party can book a hut for a number of days or book different huts for different days. A kayaker can plan a trip with stopovers at different huts. The greater the number of huts, the more choices.
- Management of the hut system product requires bookings, daily maintenance, rehabilitation and enforcement of trespass.
- Bookings of the huts can be through the use of the internet with link sites to the US Forest Service, etc; kayak companies, booking agents, etc. Bookings can include movement from one hut to another or multi-day stays.
- Daily maintenance necessitates proximity to a population center or a base of operation.
- Compliance and enforcement parameters (with regards to trespass and non-payment) need to be established.
- Opportunities are required for regional and community involvement and progress.

Structure and Amenities

- Hut structures can range from the rustic to the high end, and be situated either on land or floating.
- The high-end huts (based on single cabins) would preferably be floating and require foreshore leases. They can be floated to other locations during the off season. These are not to be confused with lodges, which are multiple unit. A high-end lodge is more conspicuous and will compromise a remote experience.
- Land-based huts are rustic, easily constructed and maintained, and are less intrusive. Examples include the US Forest Service huts in Alaska, the Dawson Creek Forest Service on Wapiti Lake, or locally with the 17 huts developed by the Heiltsuk First Nations along the outer Mid Coast.
- Huts can be designed to accommodate a large number of people, however the larger the structure the more intrusive it is to the landscape and the setting.
- Docks can be built to improve access. Buoys are visually more appealing and may reduce the risk of vandalism. Ramps can be built to allow paddlers to carry their kayaks over rocky shores.
- Huts can be placed in locations that maximize viewing and access opportunities.
- It is advisable that structures not use plywood as the glue is a favorite with porcupines.

6.8.2 Market, Economic and Social Assessment of Hut-to-Hut Systems

Competition

Marine Hut to Hut

There are no marine hut-to-hut products presently offered on the coast of BC. However, the Hartley Bay band is in the process of completing a Lodge on the north end of Princess Royal Island on Cornwall Inlet that will likely offer competition to a marine experience on the Mid Coast when it is completed. The nearest established competition for a marine hut experience is that offered by the huts and cabins in Alaska. There are two components to the hut experienced in Alaska - one offered by the United States Forest Service and another offered by private business operators. The United States Forest Services operates approximately 193 rustic cabins in Alaska. These include 42 cabins in the 5.8 million-acre Chugach National Forest, which extends south and east from Anchorage along the south central Alaskan coast. The remaining cabins are located in the Tongass National Forest, 17 million acres occupying the "panhandle" or southeast portion of Alaska. A significant number of the United States Forest Service huts are either on the coast or on lakes close to the coast. The Forest Service huts are all rustic in nature and recreationists generally travel to one hut as a destination, rather than having a number of stopovers at different huts. However, in at least one Ranger District, the concept of linking a series of rustic huts is being considered. A number of the United States Forest Service huts are located on the ocean.

There are also approximately 30 private businesses offering hut and backcountry lodge experiences throughout Alaska with most offering rustic cabin-type accommodation. All accommodation is located in relatively remote areas and none of the privately operated huts promote a hut-to-hut opportunity.

- In the southeast or panhandle area extending up from Port Simpson in British Columbia to Sitka, there are approximately ten operations offering wilderness hut experiences. Of these, two are floating kayaking bases.
- In the south central portion of Alaska there are approximately 20 businesses that offer rustic cabins in isolated or wilderness settings with many of the operations in this area focused on hunting and fishing activities.
- In the southwest of Alaska, there are approximately five businesses offering rustic cabins or huts, with operators offering wilderness viewing and other adventure tourism activities.
- In the northern interior portion of Alaska there are a further five businesses offering cabin or hut rentals in a wilderness setting.

Trail hut systems

For the hut system associated with backcountry trails (skiing, hiking, snowmobiling, mountain biking and wildlife viewing) there is a growing number of competitors in BC and the surrounding jurisdictions. In BC, there are approximately 15 businesses offering backcountry wilderness experiences featuring either huts or small lodges. As well, the Alpine Club of Canada maintains seven huts in BC, and local recreation groups in collaboration with the BC Ministry of Forests maintain several rustic cabins across the province, primarily as emergency shelters.

In BC, the primary focus for the hut and backcountry lodge operations has been on winter backcountry skiing activities. However, many of the operations also offer a summer season. The huts and lodges typically cater to groups of between ten to twenty guests at a time. Almost all operators offer a choice between fully catered/guided packages or the use of the accommodation on a self-sufficient basis. All these operations are located in remote areas with no road access and require that the guests must either hike, ski or use a helicopter to reach the site and are predominately located on mountains. Of the operations in BC, over half are located in the Kootenays with most of the remainder located in close proximity to or in provincial parks.

Of the 15 businesses involved in hut or backcountry lodge operations in BC, only four actually provide a hut-to-hut experience. These include one operation centred out of Golden, one on the boundary of Mt. Robson Provincial Park, one in Wells Gray Provincial Park, and one located in the Whistler area. These four businesses focus on the ski season and are located at higher elevation mountain sites. There is currently no established business providing a hut-to-hut experience on the coast of British Columbia.

In surrounding jurisdictions there are also several hut-to-hut and backcountry lodge experiences that have been established including and focused primarily on the trail hut system:

- In Alberta there are two backcountry lodges operated by private interests and a further seven huts operated by the Alpine Club of Canada. Both backcountry lodges require the guests to ski in and are both located in close proximity to Banff. The seven huts the Alpine Club of Canada has in Alberta are all in the Rocky Mountains and include a hut-to-hut type experience.

- In Washington, Oregon, Idaho, and Montana there are numerous backcountry cabins and huts available through the United States Forest Service. Many of these were previously operated as ranger stations or fire lookouts and have since been converted to recreational use. Most of the huts offered through the United States Forest Service are accessible by road and are not connected to hut systems. However, there is an operation in Washington and one in Orgeon that does offer a hut-to-hut opportunity. In north central Washington State there is the Rendezvous Hut and trail system. This system of five huts located at 8 kilometre intervals is maintained by the Methow Valley Sport Trail Association for off-touring, snowshoeing and telemark skiing. In Oregon, Wing Ridge Ski Tours offer the opportunity to ski between cabins as part of their hut-to-hut tour business.

- Colorado has several developed hut-to-hut opportunities. The 10th Mountain Division Hut System is the best known. This system is located in the mountains of Colorado between Aspen, Leadville, and Vail. Styled after the European traditional hut-to-hut travel, 24 huts provide overnight shelter for seasoned backcountry skiers, riders, snowshoers, mountain bikers and backpackers. The 10th Mountain and Summit Hut Association maintains the hut system which besides the 24 huts also includes over 500 kilometres of trails. There are also other hut-to-hut systems in Colorado including the San Juan, Aspen, Central Rockies, Hagerman pass, Frying Pan, and Ruedi Reservoir hut systems. Winter and summer outdoor recreationists use these huts. Several businesses offer adventure tourism activities in association with the hut-to-hut systems in Colorado.

Market Demand

The market potential for a marine hut-to-hut product is probably significant, judging from the increasing demand for hut stays in Alaska. Paramount to determining the development of a hut system would to be to determine what activities it will support. In the outer coastal portion of the Mid Coast it is likely that ocean kayaking and nature viewing will be the predominant activity linked to the hut system. A recent survey in the US showed that an estimated 2.6 million people participated in kayaking (whitewater and kayak touring) in 1994/95. Since this time the sport has continued to grow in popularity with participation increasing by 5 to 7 percent in the US in 1999 alone. Canada and the US are identified as the top global destinations for sea kayaking.

The kayaking market has three components: ecotourism, wilderness, and adventure. The rustic hut-to-hut product is likely to appeal to the wilderness ocean kayaker, who is generally characterized as follows:

- seeks recreation with pristine environment, moderate challenge, solitude;
- prefers minimum development and limited modern conveniences;
- travels in small groups, little tolerance for other people; and,
- enjoys multi-day camping trips.

Also on the outer coast there would be the opportunity to capitalize on the small boaters and sail boats coming to the area. In the inner coastal portion of the Mid Coast the hut system would likely be linked to nature viewing and hiking. These components of adventure tourism have also experienced strong growth throughout the 1990s.

Land Use Impacts and Issues for Hut System

Existing Recreation Uses

Recreational use is generally low throughout the areas where the hut systems would be considered for development. However, when actual hut locations are identified it is assumed that the location will be selected with consideration and respect for existing recreation use.

Rustic hut-to-hut would be compatible with other tourism and recreation activities as long as the carrying capacity for the local area was not exceeded. Local recreational users would likely raise concerns if the hut-to-hut network drew significantly more recreational users to an area already popular with locals. To maintain the appropriate balance, good communications would be required between local recreational users and the operator of the hut-to-hut venue. High-end hut-to-hut would likely be marketed as an exclusive activity. Therefore, it would be best placed where there is limited interaction with existing recreational activities.

Other Land Uses

Other land uses will need to be considered when the development of tourism opportunities on the Mid Coast are undertaken. The two most predominate land uses to be considered on the Mid Coast will be forestry activities and First Nations agreements with the government.

For hut-to-hut product, visual quality is a critical consideration for this type of product. Therefore, forest practices carried out within view of a hut would need to be planned accordingly. Set back of the huts from the view of passing vessels would also be important to maintain privacy and a sense of remoteness. Therefore, forest practices carried out within view of the huts and along the travel corridors would need to be planned accordingly.

Areas with high potential for hut-to-hut will be impacted differently by forestry activity, specifically:

- Athone Island, Dufferin Island, Horsfall Island, and Campbell Island are not charted forestry areas and should not encounter any forest use issues.
- Ellerslie Lake is in the charted area of Western Forest Products, therefore, it is currently planned for future logging activity.
- Alexander Mackenzie Trail and the Nuxalk-Carrier Grease Trail cross through several charted areas of forest licensees with various logging activities along the trail network outside of Tweedsmuir Park.
- Anchor Lake and Canonna Lake are not within a charted forest area and should not encounter any land use issues.

These charted areas are subject to the Central Coast LRMP, and a variety of other plans, that control whether and how logging will take place.

First Nations Land Concerns

The Kitasoo, Oweekeno, and Heiltsuk have completed traditional use studies outlining culturally significant areas in the Mid Coast Forest District. The Nuxalk are currently conducting a Nuxalk Use Study and are seeking funding to undertake a Traditional Use Study for their traditional territory. Special considerations are given when development is considered in these areas and on the Mid Coast the region is rich in cultural sites. As well, First Nations on the Mid Coast are involved in treaty negotiations and/or have outlined specific interim measures and issues with the provincial government. While in treaty negotiations interim measure agreements are often negotiated.

Community Use or Planning

The development of a series of huts would benefit communities through the tourism opportunities they present and by providing outlets that would facilitate monitoring of nearby lands by members of the community. This second benefit is of particular importance to First Nation's communities. Huts also provide a "safe haven" which can be utilized by local residents during winter months when tourism use is expected to be minimal.

Local Employment Impact

Both low and high-end hut-to-hut products would generate a small number of direct jobs, with the number depending on the level of services and support required. Potential jobs could include:

- marketing and central booking,
- operations, maintenance, policing,
- boat/shuttle operations to huts, and
- guides and activity providers.

All of this employment could be realized locally. More employment would be generated in the guiding and catering services, which could be developed in conjunction with a hut-to-hut system. This employment would be seasonal. For the high-end hut-to-hut product on the outer Mid Coast there may be the potential to develop a storm viewing market (shoulder season), that could extend employment to eight or more months of the year.

Regulatory or Crown Tenure Requirements

If the hut-to-hut venture were privately owned and operated on Crown land, it would require a tenure issued by BC Assets and Land Corporation.

The Ministry of Forests has indicated that if this development opportunity is undertaken by a non-profit organization, a co-management agreement between the organization and Ministry of Forests could be established. Under these circumstances, the Ministry of Forests would be able to assume some of the liability associated with the endeavour. A non-profit organization also has more avenues to obtain funding for hut construction, including lotteries and fund-raisers.

Level of Community Support

A locally-owned and operated rustic hut-to-hut product would likely fit well within the local economic development plans of the communities in the area. However, a venture owned and operated by a non-Mid Coast business or organization would likely not be highly supported. The venture would need to demonstrate clear economic linkages and partnerships for the local community before it would be considered a good fit within the local economic objectives.

The communities best able to capitalize on hut-to-hut opportunities would need to be provided with more detail regarding a hut-to-hut system opportunity before a general consensus could be developed locally but would likely have the general insights:

- Bella Coola Valley would likely support a hut system providing it did not negatively impact any of their other tourism goals or recreational values. The community would need to be provided with a specific location and insights before a final decision could be made on supporting such a venture.
- Bella Bella is interested in developing a hut system utilizing their network of 17 existing rustic cabins. This hut system would be developed by the community to meet tourism goals they are currently working towards.
- Oweekeno will be doing some work in tourism in the near future and would be able to consider the development of a hut system at that time. However, currently it is too early to know how a hut system would fit with their economic development goals.
- In the short-term Klemtu is focusing on the development of adventure tourism products and undertaking tourism marketing. In the longer term a hut system to support ocean kayaking is something they might consider.

Infrastructure Requirements

The development of the huts represents the key infrastructure requirement for this opportunity. However, the hut product by itself will not support the tourist visit so the development of the infrastructure to support the other tourism product will need to be in place. For hut-to-hut activities linked with the marine environment, and associated with activities such as kayaking, little other infrastructure would be required. Hut-to-hut system linked with land based activities would need the development of an appropriate trail network.

General Capital Requirements

The investment required for the development of rustic hut-to-hut would likely be minimal to moderate and would depend on the number and type of cabins built. The huts could be a feasible investment for a community or non-profit group in partnership with a government agency such as the Ministry of Forests. The appropriate approach may be to start off with a small number of rustic cabins and then over time develop the network as financing becomes secured. Bank financing would be difficult to obtain for this type of venture because of the remote nature of the cabins. As well, if the cabins were situated on land that was not owned by the operators, it could create further difficulties in financing.

A high-end hut system would represent a more significant investment. These kinds of cabins are best built on floating platforms to allow for relocation during the non-operating season to protect the investment. This could necessitate registering them as marine vessels, making them more difficult to finance. The source of capital for this type of venture will depend on who is initiating and ultimately operating the network of huts. In Alaska, the hut system is entirely owned and operated by the US Forest Service, with central bookings carried out by a contractor in New York. The US Forest Service - Alaska Region does not run on a for-profit basis and, in fact, only 60 to 70 percent of the annual costs incurred are recovered from user fees (the rest is paid for by the Forest Service).

For the private investor, the concept would need to be sound and self-supporting and obtaining capital from traditional banking sources will be challenging, in light of the seasonal nature and remoteness of the operation.

The most likely financing would be through equity raised by the operator directly or from private investors who would be interested in partnering in such a concept.

Table 6.8-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Hut to Hut Product have been identified as *polygons* on the map and are described in Table 6.8-3.

Hecate lowlands: photo by Warren Fox

Table 6.8-2: PRODUCT ANALYSIS TABLE: HUT SYSTEM

Unit Name /Number		Outer Coast (1)	Fiords & Lakes(2)	Mountains &Trade Route (5)	Princess Royal Island (6)
Resource Criteria					
Uniqueness of Key Features	Setting	High	High	High	High
	Geography	High	High	Medium	High
	Wildlife	Medium	Medium	Medium	High
Supportive Resources	Sheltered approach	High	Medium	NA	Low To Medium
	Level / Water	High / Low	Low -Medium / Medium	Low / Medium	Medium / High
	Significant features	High (islands, open/sheltered waters, beaches, culture, wildlife)	High (scenic inlets and lakes, beaches, culture)	Medium (scenic, water features)	High (scenic inlets and lakes, beaches, culture, wildlife)
Existence of Supportive Infrastructure		Low	Low	Low	Low
Associated Products		Marine Non-Motorized, Marine Motorized, Cultural and Nature Observation		Cultural Observation, Trail activities	Marine Non-Motorized, Trail activities, Cultural and Nature Observation
Significance of Associated Products		High	High	Medium	High
Access to Sub Unit Area		High (Discovery Passage Ferry)	High (Discovery Passage Ferry)	High (BC Ferry And Highway)	Low
Access from Staging Area to Resource		Medium -High (Bella Bella, Klemtu, Dawsons Landing, Pruth Bay)	Low -Medium (Bella Bella, Ocean Falls)	Low (Bella Coola)	Low -Medium (Klemtu)
Prime Season		Summer	Summer	All	Summer
RESOURCE DISCUSSION		- **Trail Hut systems** associated with beaches along the Calvert Island coast and Burnett Bay. Trail development along exposed beaches required. Moderate suitability. **Marine hut systems** on islands including Swindle, Athlone, Campbell, Cunningham, Macnaughton group, Spider, Triquet and other islands west of and including Hunter Island.. Along Fitz Hugh Sound from Namu to Dawsons Landing:. - Huts may be spaced or clustered. - Trail development to link sheltered landings and exposed	- Lake hut system: Lakes of outstanding scenic beauty include Ellerslie and Roderick Lakes. Primarily fly-in opportunities – - Marine hut systems in the inlets provide shelter for small boaters /kayakers from winds / currents. - Culture and nature interpretation. - Moderate suitability.	- A trail hut system along the Alexander Mackenzie trail has limited opportunities due to the low number of recreationists, repeatability elsewhere, high potential for vandalism, difficulty in maintaining the site. - Culture and nature interpretation. - Low suitability.	- Lake hut system: Lakes of scenic beauty include Butedale, Anchor, Canoona, Cougar, and Deer Lakes. Boating and fly-in opportunities. - Marine hut system: Shelter for small boaters/kayakers along outer coast. - Internationally recognized for the Kermode bear - Moderate suitability.

	beaches. - Shuttling /trail access opportunities. - Locating huts away from culturally and environmentally sensitive areas. - Highest suitability. **Marine/Lake circle hut systems** potential linking Fish Egg, Elizabeth Lake, Hardy and Dawson Landing. - Moderate suitability.			
COMMUNITIES MOST ABLE TO BENEFIT	Bella Bella, Dawsons Landing	Bella Bella, Shearwater, Ocean Falls	Bella Coola, Hagensborg	Klemtu, Hartley Bay

Market, Economic and Social Criteria

Unit Name /Number		**Outer Coast (1)**	**Fiords & Lakes(2)**	**Mountains&Trade Route (5)**	**Princess Royal Island (6)**
Level of Competition		- regional: low - provincial: low to medium - international: low	- regional: low - provincial: low to medium - international: low	- regional: low - provincial: medium - international: high	- regional: low - provincial: low to medium - international: low
Market Demand Potential		- BC and regional US: high - international: high			
Impact/Conflict	Existing Recreation Use	- Low	- Low	- Low to Moderate	- Low
	Other Land Uses	- forestry use - low - treaty-related measures with the Heiltsuk	- forestry use - medium to high	- various issues the trail route – Nuxalk have identified several land use and opportunities	- forestry use - low - Tsimshian working towards treaty related measures
	Community Use or Plans	Would need to balance alternative local uses.			
Local Employment Impacts		Low - small amount of employment would be directly associated with the hut-to-hut system. However, the hut-to-hut system would help support employment in associated adventure tourism activities.			
Regulatory or Crown Tenure Requirements		Tenure or permit required from BCAL			License of occupation required.
Level of Community Support		Bella Bella is exploring the development of a hut system.	Bella Bella is exploring the development of a hut system.	Would support providing no negative impacts.	Unknown.
Infrastructure Requirements		Moderate - development of the huts.	Moderate - development of the huts.	High - development of the huts and trail system.	Moderate - development of the huts.
General Capital Requirements		Relatively low for rustic huts rising with higher end facilities.		Relatively low for rustic huts rising with higher end facilities. Potential cost associated with trail development and maintenance.	Relatively low for rustic huts, rising with higher end facilities.

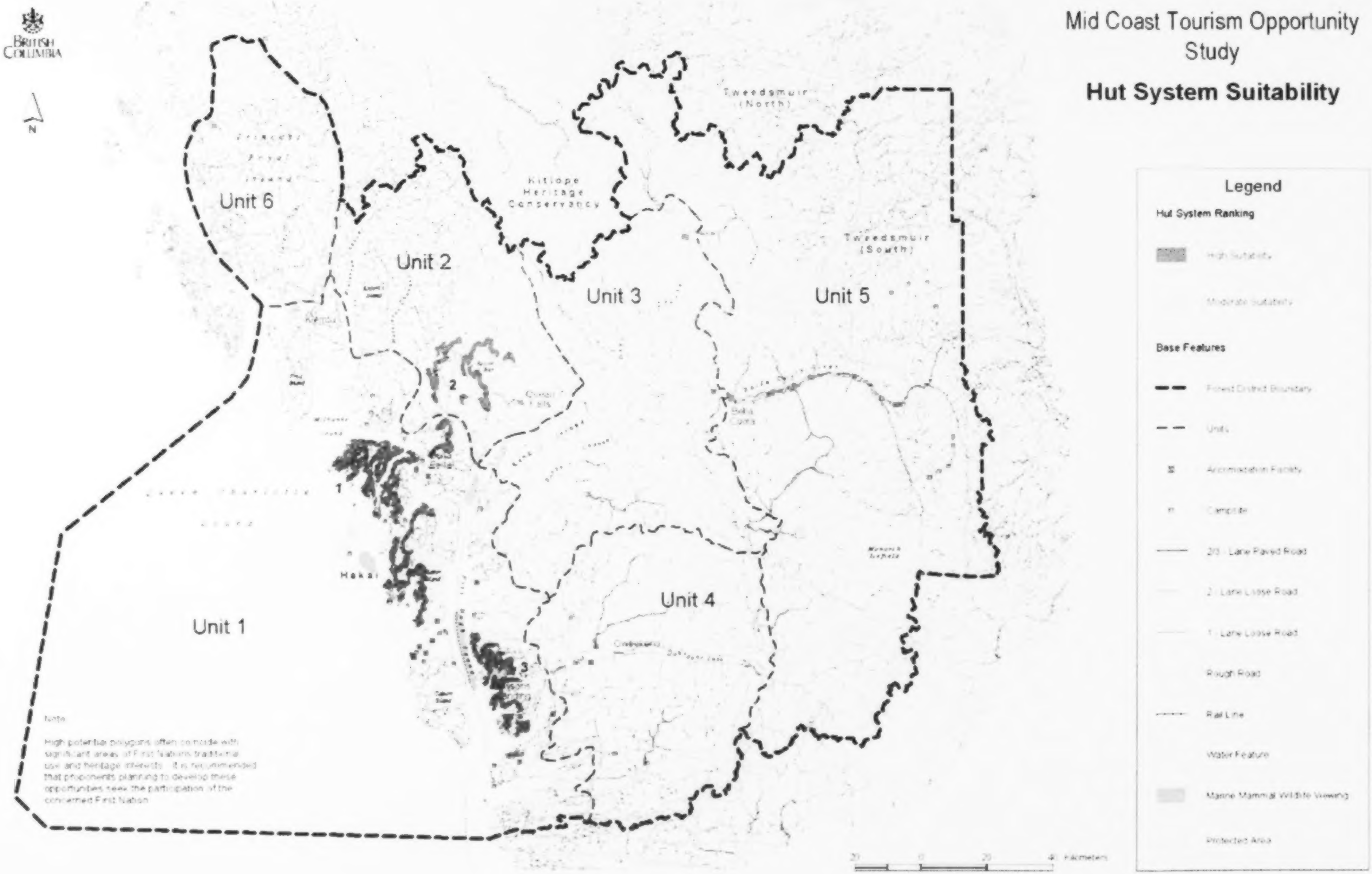
POLYGONS EXHIBITING HIGHEST POTENTIAL	**1, 2, 3**			

Refer to Table 6.1-1 for definition of foregoing criteria. The following describes the highest potential polygons.

Table 6.8-3: Descriptions of Highest Potential Polygons for the Hut System Product

Polygon Number	Polygon Description
1*	Focus: Islands of the outer coast including Athlone, Campbell, Cunningham, Macnaughton group, Spider, Triquet and other islands west of and including Hunter Island.. Staging Area: Bella Bella, Pruth Bay These areas are very suitable for the hut system for the following reasons: Geographically suited for the product. Proximity to Bella Bella allows for the maintenance, monitoring, and management of the huts. Very high Heiltsuk First Nations cultural sensitivity. High incidence of ancient village and cultural sites and sensitive food gathering sites require close monitoring of recreation user numbers, management of recreation activity including placement of suitable campsites and the hut system allows this to take place. Hut systems can increase the number of campsites that are extremely limited along the coast (and all of these sites are significant cultural heritage or food production areas). Hut System associated product:: Cultural Interpretation, Ocean Kayaking, Boating, Hiking
2*	Focus: Roscoe Inlet, Troupe passage, Return Channel and Bullock Channel to Ellerslie Lake. Staging Area: Bella Bella This areas is suitable for hut systems for the following reasons: There are suitable locations for a hut product. There is an opportunity to link Ellerslie Lake to Roscoe Inlet by trail providing access to a marine and freshwater environment. Very high Heiltsuk First Nations cultural sensitivity. High incidence of ancient village and cultural sites and sensitive food gathering sites require close monitoring of recreation user numbers, management of recreation activity including placement of suitable campsites and the hut system allows this to take place. Hut System associated product:: Cultural Interpretation, Ocean Kayaking, Boating, Hiking
3*	Focus: From Fish Egg Inlet to Rivers Inlet Staging Areas: Dawsons Landing This area is suitable for the hut system for the following reasons: Geographically suited for the product. Islands and lagoons provide diversity. Views of Fitz Hugh Sound. Potential for a loop using Elizabeth Lake, Moses and Hardy Inlet to Dawsons Landing in Rivers Inlet. Hut System associated product:: Cultural Interpretation, Ocean Kayaking, Boating, Hiking

* Although there are opportunities for hut system developments in the areas identified in the unit analysis, the final analysis focuses attention on the most geographically suitable area that can be readily managed, having the greatest potential for expansion and most beneficial to an area. The other areas have been identified as having moderate suitability (and opportunity).



Mid Coast Tourism Opportunity Study

Hut System Suitability

British Columbia
N
Unit 1
Unit 2
Unit 3
Unit 4
Unit 5
Unit 6
Princess Royal Island
Kitlope Heritage Conservancy
Tweedsmuir (North)
Tweedsmuir (South)
Bella Coola
Hakai
1
2
3
20 0 20 40 Kilometers
Legend
Hut System Ranking
High Suitability
Moderate Suitability
Base Features
Forest District Boundary
Units
Accommodation Facility
Campsite
2/3 - Lane Paved Road
2 - Lane Loose Road
1 - Lane Loose Road
Rough Road
Rail Line
Water Feature
Marine Mammal Wildlife Viewing
Protected Area

Note:

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

6.9 Adventure

6.9.1 Resource Assessment

Description

The Adventure Product is focused on the enthusiastic recreationist seeking an adrenaline experience. The activities identified include windsurfing in high winds, whitewater kayaking, exposed ocean kayak, ski mountaineering, mountaineering, rock climbing, caving/canyoning, downhill mountain biking and paragliding. While most of the products evaluated in this study are soft or wilderness adventures, the Adventure Product here pertains to extreme forms of activity. These include the following.

- *Windsurfing* in high winds requires tremendous skill in tacking and launching with the use of short boards.
- *Whitewater kayaking and rafting* for the skill level proposed in this product requires at least a class 3 river. "Play" areas benefit the experience.
- *Open water ocean kayaking* requires the knowledge of remote camping, navigation, surf landings and launches and a host of skills required to encounter the surf, ocean swells, winds and the rigors and force of a rugged and unforgiving coastline.
- *Ski Mountaineering and mountaineering* is about climbing mountains. It is "more than climbing, panoramic views and wilderness experience. It is also a challenge, risk, and hardship"[1]. It requires knowledge of the tools and techniques of camping, navigation, belaying, rappelling, glacier travel, safety, rescue, and climbing on rock, snow and ice. Winter includes knowledge of winter camping and travel including skiing, and telemark techniques are a requirement to meet the challenges.
- *Rock climbing* takes place on faces that range from boulders to big walls. It shares the knowledge of the tools and techniques of mountaineering with a focus on climbing vertical and near-vertical rock faces.
- *Caving and canyoning* are specialized activities that share some of the tools and techniques of mountaineering and climbing. Caving is a subterranean activity and canyoning requires wading and swimming.
- *Mountain biking* for this product encompasses two extreme forms: "randonneur" and downhill. Randonneur utilizes long distance trails. Downhill utilizes specially outfitted heavy duty mountain bikes built primarily for navigating down steep single track, or difficult trails with achievable obstacles. Helicopters are sometimes used for access opportunities to summits and staging areas.
- *Multi-day Backpacking* requires the knowledge, skills and physical ability to traverse long distances over many days. Assistance with the use of llamas, horses or mules as pack animals is a consideration.
- *Paragliding* is an activity that may be relatively easy but entails a degree of fearlessness. In certain areas paragliding can take place off high ridges and cliffs. The knowledge of winds flows and thermals is a requirement in these settings.

The rationale for including the Adventure product springs from what we see as some of the Mid Coast's most alluring qualities – an image of remote, "frontier" communities in a spectacularly wild setting. The long ferry trip to gain access to the region, and the reputation of The Hill both contribute to the Mid Coast's image as a special and untouched part of the world. The development of adventure products can build on – and contribute to -- the wild, or "extreme", reputation of the Mid Coast.

---

[1] From *Mountaineering: The Freedom of the Hills, p. 14.*

Most adventure products are not, in and of themselves, highly profitable, but they do attract a diverse and interesting market, generally younger and with disposable income – and willing to travel a considerable distance to participate in their sport of choice. If a small number of adventure tour operators in inter-related businesses were to become established in a Mid Coast community, they could jointly draw a new and unique market to the region. A cluster of adventure product businesses in any community would generate income in the tourism sector, and for ancillary businesses in the community.

Table 6.9-1: Region SWOT Analysis for Adventure

Strength	Challenging recreation features close to staging areas suitable for a range of adventure activities. Attractiveness to a growing market. Fosters image of community as an extreme destination.
Weakness	High precipitation and inclemental weather. Remoteness from population centers and cost to get to the staging areas. Lack of supportive infrastructure. Limited rescue capability. Access for some of the activities.
Opportunity	Development infrastructures and support products to the range of activities. Support includes sales, rentals, teaching, guiding, shuttling and information support.
Threats	Lack of community support.

Adventure and the Mid Coast

The Mid Coast has geographical features well suited for the adventure product.

- *Windsurfing*: Reliable high winds are associated with the inflows and outflows of the major river valley with focus on Bella Coola. Ocean chop is a general limitation in areas exhibiting high winds. The suitability for this product has not been fully explored.

- *Whitewater kayaking and rafting:* There may be opportunities for whitewater kayaking in the many rivers of the region but the remoteness limits access and exploration. The major rivers are not suitable for whitewater rafting but more suitable for drifting.

- *Open water ocean kayaking:* The opportunities are associated with the outer coast from Princess Royal to Cape Caution. Rugged coastlines, remoteness, inclement weather and winds, and miles of open coastline with opportunities for shelter make this region an ideal adventure ocean kayaking product.

- *Ski Mountaineering and mountaineering:* The Coastal Mountains provide prime mountaineering. The rugged peaks offer a variety of challenges and the Monarch Icefield is extensive. Inclement weather adds to the challenge but must also be accounted for with regards to safety.

- *Rock climbing:* The cliffs flanking the Bella Coola Valley provide tremendous big wall climbing opportunities. There may be other opportunities for low climbs. Wet weather is a limiting factor.

- *Caving and canyoning*: This is an unexplored possibility. Caves are associated with cultural heritage values.

- *Extreme mountain biking. Randonneur* opportunities may lie with the grease trails, particularly the Alexander Mackenzie Heritage Trail (Nuxalk -Carrier grease trail) which connects the coast to the Fraser River. The route is a total of 450 km in total length with 350 km over land. Seventy-five kilometers is undisturbed footpath (Aboriginal footpath) and 132.5 km is on wagon road. The trail is rich in cultural heritage, natural features and wildlife.

  The *downhill* component of mountain biking may utilize the logging roads and trails close to the Bella Coola Valley. This product may be linked to a helicopter drop-off.

- *Multi-day Backpacking* has tremendous potential linked to the Alexander Mackenzie Heritage trail. There is a potential to provide assistance with the use of pack animals although logistics may be costly for returning the animals from this linear trip.

- *Paragliding.* The thermals and steep cliffs that flank the Bella Coola Valley are suitable for paragliding activities. Enthusiasts can bring their own equipment or if available, rent equipment when there. Novice tourist can be taken in tandem with a guide. Hikes to the ridges or a short helicopter ride to the ridge top are options. The limitations are high precipitation and strong winds above 10 – 12 km associated with outflows in the winter and inflows during the summer months. Strong winds interact with the surroundings and in valleys like the Bella Coola, the results are amplified as turbulence. Inflows in the summer generally begin in the afternoon, leaving mornings and a window in the evenings as opportunities. Unpredictability of the weather is a limitation in assuring that a visitor will have an opportunity to participate in this activity.

The grouping of features and conditions suitable for a host of enthusiast activities such as windsurfing, mountaineering, ski mountaineering, rock climbing, mountain biking and paragliding make the Bella Coola Valley well suited for promoting this product. Bella Coola, Klemtu, Dawsons Landing and the outer communities, lodges and resorts offer opportunities for the open water ocean kayaking activity.

6.9.2 Market, Economic and Social Assessment of Adventure Product

Competition

British Columbia and the Pacific Northwest are major destinations for extreme adventure recreationists. There are several major adventure operations throughout the area, and many more small ones. The key attractions include (but are definitely not limited to) the following:

- windsurfing: the Gorge in Oregon, Squamish, Nitinat Lake on Vancouver Island, Harrison Lake in the Fraser Valley;
- whitewater kayaking and rafting: Columbia River Valley, Vancouver Island, Lower Mainland, Chilcotin; also rafting on the Thompson and Fraser rivers;
- open water ocean kayaking: west coast Vancouver Island;
- ski mountaineering, mountaineering and rock climbing: Squamish Forest District, Mount Ranier and Mount Hood (US), Southeast BC including Bugaboos and Purcells, Mount Waddington;
- caving and canyoning: caving on Vancouver Island, canyoning in Chilcotin;

- long distance biking: Kettle Valley Railway corridor, proposed Vancouver Island and Trans-Canada Trails;
- downhill biking: any hill with a lift – e.g., Whistler, Interior BC;
- multi-day backpacking: West Coast Trail, Nitka Island, trails in parks throughout BC and Pacific Northwest;
- paragliding: Okanagan Valley and throughout BC.

The competition for many adventure products in BC is stiff. However, adventure enthusiasts generally enjoy seeking out new experiences and locations, and are often willing to travel far afield to indulge their passion.

Presently, there is very little "extreme" adventure activity on the Mid Coast. It is our understanding that, during the 1960s and 1970s, there was a spate of rock climbing activity in the Bella Coola area, however this has waned in popularity. We are also told that some locals in the Bella Coola area occasionally paraglide. However, to the best of our knowledge, there are no "extreme" adventure tour operators on the Mid Coast.

Market

Each activity in the Adventure Product category has a unique market, ranging from beginners to highly experienced recreationists. The activities also vary in safety, equipment requirements, and technical requirements. Most of these activities require strength, skill and stamina and have greatest appeal for younger and fit travellers. Those who seek out guided adventure experiences generally have higher disposable income, and are willing to pay for the local knowledge and guidance required to undertake the activity. They are often willing to travel considerable distances to experience new conditions and and try techniques. The question is, what activities have the potential to grow successful local businesses?

- ***Windsurfing*** is popular worldwide, and is generally suited for relatively calm water with reliable winds. The market is large, with a variety of sub-niches, such as ocean and lake windsurfing, and kite boarding. A review of the internet resources for windsurfing shows that there are at least seven windsurfing magazines in North America, and many more websites. There are approximately 1,200 visits to the World Windsurfing Directory every day.

  The windsurfing experience in Squamish is instructive. Squamish has emerged as a major windsurfing draw in British Columbia. Membership in the Squamish Windsurfing Society has increased 10 to 20 percent annually for seven of the nine years of the history of the association. This has occurred with minimal marketing. Most regular members are local, although windsurfers also travel to Squamish from regional US and eastern Canada. This shows that, if there are good conditions, new windsurfing destinations have the potential to draw a growing market.

- ***Whitewater kayaking*** opportunities are limited on the Mid Coast due to the remoteness of the most suitable rivers. Consequently, we see little market for this product.

- The risk and technical requirements of ***open water ocean kayaking*** appeals to a small niche of the ocean kayaking market. The market for kayaking (river and ocean) in North America is enormous – 2.6 million in the US in 1994/95 -- and expected to grow. This encompasses many different types of kayaking experiences and abilities, ranging from novice kayaking in protected waters, to long distance journeys on the open ocean. There are other niches such as surf kayaking (done a great deal on the West Coast of Vancouver Island), and storm-sea kayaking which is done on specialized surf-skis during storms or hurricanes.[2]

A kayaking tour operator in Tofino informs us that they and other operators offer open water ocean kayaking as part of some of their multi-day tour packages. Because the feasibility of open water kayaking on any given day depends on weather and water conditions, open water trips are not easy to plan. Nonetheless, the demand for over-night and multi-day tours is growing, and keeps several operators going during the summer months on the West Coast of Vancouver Island. Clearly, local guides with knowledge of the open water conditions on the Mid Coast could find a valuable niche in this sport.

- ***Ski mountaineering*** is done in backcountry, often alpine, settings and generally involves creating one's own tracks. Light touring is done over shorter distances, for smaller periods of time (possibly with overnight stay) and requires lighter equipment. Backcountry skiing involves longer trips or excursions in more remote backcountry or alpine settings.

  Those drawn to ski mountaineering are generally relatively affluent, and well educated, and share a passion for solitude, wilderness and strenuous exercise with climbers. Statistics are not readily available on the size of the market. Generally, ski touring and mountaineering is a "club niche" sport. It appears to draw a variety of people, in particular those who engage in mountaineering activities, nordic skiers seeking off-track experiences, and seasoned alpine skiers looking for more solitude.

  There are conflicting opinions about the demand trend for ski mountaineering. Enthusiasts in this sport claim that the interest is growing, although no statistics are available to support it. However given the high level of energy required for this sport, and the time required to engage in ski touring and mountaineering, its attractions are offset to some degree by the practical considerations of aging recreationists, who are generally short on time. Most likely the demand for this activity will remain strong within small niche groups who reside in or near alpine settings and who have the time and energy to make this sport a priority.

- The market for ***ice/rock climbing*** is similar to that for ski mountaineering, appealing to a young, fit and energetic clientele. There are several types of ice and rock climbing, which vary according to technical requirements, risk and exertion level:

  - Scrambling requires no rope or other climbing equipment;
  - technical climbing requires the use of special techniques/equipment;
  - snow and ice climbing requires ascents over snow or ice-covered surfaces, and involves equipment; and,
  - mountaineering involves extended expeditions of climbing and living within a mountain or alpine environment.

  Guided climbing tours are offered in alpine areas around the world, ranging from introductory lessons on local mountains to extended climbs of difficult peaks in "exotic" destinations like Nepal, South America,

---

[2] This is true! For more information on storm sea kayaking, see the *Atlantic Monthly*, August 1995 edition, or website address: www.theatlantic.com/unbound/flashbks/extreme/todkayk.htm.

Mexico, Iceland and Alaska. In 1993, ice/rock climbing operations accounted for over 12,988 traveller-days in Canada, and 92 percent of these lasted longer than one day.[3] More than half were sold through a preset package with an average duration of 4.7 days.

- ***Caving and canyoning*** opportunities are limited on the Mid Coast, and this does not represent a significant opportunity.

- ***Mountain biking*** is associated with trails, some logging roads and sometimes helicopters or vans. Easier rides can be found on rolling terrain on well-developed trails; high elevations are more suited to heli-mountain biking. Roaded valleys also offer the opportunity for vehicular transport to the end of the road. Generally, the market for mountain biking is young (under 40), with participants travelling as couples or with groups. More than 83 percent of all visiting mountain-bikers in Canada are Canadian and, as yet, there is a very small international market. The market is expected to grow.

- ***Multi-day backpacking:*** Hiking involves travel by foot to remote areas, usually on marked trails. It includes backpacking, however the two activities differ in terms of exertion, equipment and location of activity. Backpacking requires greater exertion, occurs almost exclusively in wilderness areas, and tends to take place on trips involving a great deal of camping.

  The US backpacking market has been estimated at over 15 million Americans in 1995. There was a 73 percent increase in US backpacking trips between 1982 and 1995. The demand for both hiking and backpacking activities will continue to see strong growth in North America. European travellers, most notably the Germans, also have a strong interest in hiking.

  Adventure travel companies are offering more hiking and trekking packages each year world wide, and three to four day treks comprise a significant share of western Canadian itinerary packages sold by European tour wholesalers.

- ***Paragliding*** has a small but enthusiastic market in North America, but appears to be a much more popular sport in Western Europe. It is estimated that there are 20,000 to 25,000 paragliding and hang gliding recreationists in the US, with a few thousand more active in Canada.[4] BC accounts for the largest number, with nine free-flight associations and clubs, while Ontario has four. Quebec, Alberta and Saskatchewan each have two associations or clubs, while Manitoba and the Atlantic each has one. In BC, the clubs and schools are situated all over the province, most notably the Okanagan, Kamloops, Vancouver Island, Selkirk and Golden.

  Paragliding is growing in popularity around the world, and is outstripping the demand for hang gliding. Paragliding is less expensive than hang gliding, and there have been more developments for beginner and intermediate paragliding recreationists than for hang gliding. There are paragliding competitions, festivals and meetings staged all over the world every year, and these draw many enthusiastic participants.

---

[3] Tourism Canada (February 1995), *Adventure Travel in Canada: An Overview of Product, Market and Business Potential.*

[4] Estimate from the editor of *Air Magazine*, the official publication of the Hang Glider and Paraglider Association of Canada.

Land Use Impacts and Issues for Adventure Product

Existing Recreation Uses

Because most of the Adventure activities take place in the wilderness or remote areas, they generally do not conflict with all other tourism and recreation activities, but current and planned. Some of the impacts related to open water ocean kayaking are identical to those outlined in Section 6.3 on kayaking. There is also potential for conflict on trails between mountain bikers and hikers, but this can be minimized with good planning.

Other Land Uses

Without proper management, several of the activities (particularly those that occur on shorelines such as windsurfing or kayaking) have the potential to conflict with First Nations traditional use, and forestry use, both of which have been described earlier in this report.

Community Use or Planning

The development of a cluster(s) of adventure products could serve to attract tourism revenue to local communities. To the best of our knowledge, none of the communities of the Mid Coast are exploring these Adventure activities.

Local Employment Impact

Direct employment impacts in the operations of adventure businesses will be low and seasonal in nature, however they could generate additional employment in the service sector – e.g., rentals, supplies, accommodation.

Regulatory or Crown Tenure Requirements

A tenure or permit may be required for those activities that use a specific land area at least fourteen days in a six-month period, or where the proponent wishes to create or maintain private trails and campsites. This would likely apply to most of the Adventure activities. Paragliders are required to obtain a license from the Hang Glider and Paraglider Association of Canada, a self-regulating body.

Level of Community Support

Locally-based Adventure businesses would generally be a good fit with the economic development goals of all the Mid Coast communities. However, a venture initiated by a non-Mid Coast entrepreneur would not receive local support, unless there are solid economic links to and partnerships with the community. To garner community support for a new adventure product, the proponent must demonstrate that most of the benefits would accrue to locals, and that cultural or traditional sites are protected.

Some communities may not support the development of those activities that present extraordinary risk – e.g., storm sea kayaking, or paragliding in risky locations.

Infrastructure Requirements

Infrastructure requirements for establishing an adventure business are relatively low, compared to products such as destination lodges, air tour or marine cruising. The major requirement is equipment. However, the cost of equipment varies widely by activity -- for example, good mountain bikes range in price from $600 to $4,000+, and paragliding equipment can cost at least $1,500 to $2,000.

General Capital Requirements

Capital requirements range from small to moderate.

Table 6.9-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Ocean Kayaking Product have been identified as *polygons* on the map and are described in Table 6.9-3.

Table 6.9-2 PRODUCT ANALYSIS TABLE: ADVENTURE

Unit Name/Number		Outer Coast (1)	Fiords & Lakes(2)	Channels (3)	Owikeno Lake (4)	Mountains and Trade Routes (5)	Princess Royal Island (6)
Resource Criteria							
Uniqueness of Key Features	Natural Setting	High	High	High	Medium	High	High
	Opportunity Grouping	Low	Low	Low	Low	High	Low
	Significant Feature	High (outer coast, long beaches)	Medium	Low	Low	High (rocks and trail)	Medium (rock)
Supportive Resources	Peaks and icefields	Low	Medium	Medium	Medium	High	Medium
	Rock faces	Low	High	Medium	Medium	High	High
	Challenging waters	High	Low	Low	Medium	Low	Low
	Optimal Winds	Low	Medium	Medium	Medium	Medium	Low
Existence of Supportive Infrastructure		Low	Low	Low	Low	Low	Low
Associated Products		Air tour (air access),camping, trail products					
Significance of Associated Products		Low	Medium	Medium	Medium	High	Medium
Access to Sub Unit Area		High	Medium	Medium	High	High	Medium
Access from Staging Area to Resource		High	Medium	Medium	High	High	Medium
Prime Season		Spring – fall	Spring - fall	Spring - fall	Spring - fall	Spring - fall	Spring - fall
Resource Discussion		- High opportunity - Significant open water ocean kayaking	- Moderate opportunity. - Scattered opportunities for rock climbing and mountaineering.	- Moderate opportunity - Scattered opportunities for rock climbing and mountaineering.	- Low opportunity - Scattered opportunities for rock climbing.	- High Opportunity - Significant cluster of opportunities for: - Rock climbing, - Mountaineering, - Mountain biking . - Paragliding - Windsurfing	- Moderate opportunity - Scattered opportunities for rock climbing. Focus on Anchor, Bute and Whalen Lakes.
Communities Most Able to Benefit		Bella Bella, Klemtu, Shearwater, Dawsons Landing	Bella Bella, Shearwater, Ocean Falls	Bella Coola, Bella Bella, Ocean Falls, Namu	Rivers Inlet, Owikeno	Bella Coola	Klemtu, Hartley Bay

Market, Economic and Social Criteria

Unit Name/Number		Outer Coast (1)	Fiords & Lakes(2)	Channels (3)	Owikeno Lake (4)	Mountains and Trade Routes (5)	Princess Royal Island (6)
Level of Competition		- Regional: low - Provincial: high - International: high					
Market Demand Potential		Open ocean kayaking: low to medium	Mountaineering & climbing: low to medium	Mountaineering & climbing: low to medium	Climbing: low to medium	Mountaineering & climbing: low to medium Mtn biking: low to medium Paragliding & windsurfing: low to medium	Climbing: low to medium
Impact/ Conflict	Existing Recreation Use	- Little or no conflict with existing or planned uses				- possible conflict of biking and hiking uses on trails	- Little or no conflict
	Other Land Uses	- Little or no conflict	- Little or no conflict	- Little or no conflict	- Little or no conflict	- Possible First Nations, forestry	- Little or no conflict
	Community Use or Plans	- Fits with local tourism development initiatives of the Heiltsuk - Kitasoo: unknown - Oweekeno: unknown	- Fits with local tourism development initiatives of the Heiltsuk - Ocean Falls and Kitasoo: unknown	- Fits with local tourism development initiatives of the Heiltsuk	Oweekeno: unknown	- Bella Coola & Hagensborg: fits with local tourism development - Nuxalk: unknown	- Kitasoo: unknown
Local Employment Impacts		Low number of direct, seasonal jobs; could stimulate indirect employment in service sector					
Regulatory or Crown Tenure Requirements		- Tenure or permit may be required				- License of Occupation may be required - - License required from Paraglider Association	- License of Occupation may be required

Level of Community Support	- positive support by Heiltsuk if initiatives are locally based	- Positive support if initiatives are locally based	- positive support by Heiltsuk if initiatives are locally based	- Oweekeno: unknown	- positive support by Bella Coola and Hagensborg - Nuxalk: unknown	- Kitasoo: unknown
Infrastructure Requirements	- Varies by activity, but generally small amount of infrastructure					
General Capital Requirements	- Low to medium					
POLYGONS EXHIBITING HIGHEST POTENTIAL WITHIN EACH UNIT	**1, 2, 3,4**	-	-	-	**5,6,7,8**	

Refer to Table 6.1-1 for definition of foregoing criteria. The following provides definitions of highest potential polygons.

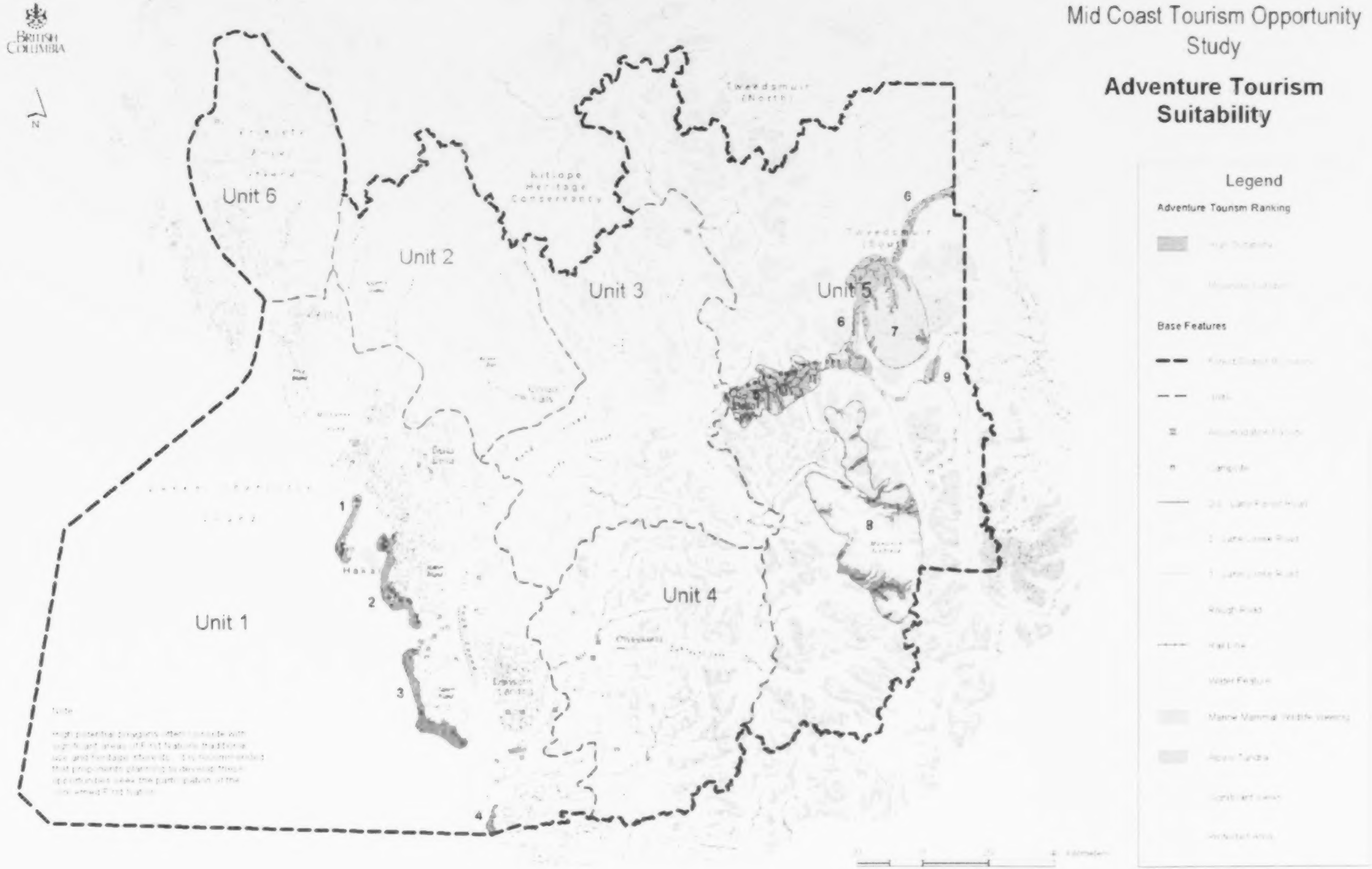
Table 6.9-3 POLYGON DESCRIPTION TABLE: ADVENTURE PRODUCT

Polygon Number	Description of Polygon
1	Focus: Goose Group and McMullin Group Staging Area: Bella Bella Exposed islands open to the full force of the ocean, the McMullin Group contains a large beach and the Goose Group contains beaches, lagoons and bogs. Very high Heiltsuk First Nations interest. Adventure associated product: Ocean Kayaking
2	Focus: Simmonds, MacNaughton to Sterling Group (outer islands and coast) Staging Area: Bella Bella Valley These islands have a rugged and exposed windward side exposed to the force of the open Pacific. Beaches, lagoons and the calm leeward sides of the islands provide a varied and challenging experience. Very high Heiltsuk First Nations interest. This polygons falls within the Hakaii Recreation Area. Adventure associated product: Ocean Kayaking
3	Focus: Calvert Island (outer coast) Staging Area: Pruth Bay Exposed wind swept beaches characterizes the west coast of Calvert Island. This polygon falls within the Hakaii Recreation Area. Adventure associated product: Ocean Kayaking
4	Focus: Cape Caution, Blundell Bay Staging Area: Dawsons Landing Long white sand exposed wind swept beaches characterizes the coast of Cape Caution. Spectacular. Potential for whale watching. Adventure associated product: Ocean kayaking.

5	Focus: Bella Coola Valley Staging Area: Bella Coola, Hagensborg The Bella Coola valley with its towering cliffs and snowcapped peaks offers opportunities for a variety of land based adventure products. Adventure associated product: Air tours (access)
6	Focus: Alexander Mackenzie Heritage Trail (Nuxalk-Carrier Grease Trail) Staging Area: Bella Coola Valley The 350 km land portion of the trail begins in Bella Coola and requires an extensive multi-day hiking or mountain biking opportunity culminating at the Fraser River. The trip may require provision drop offs. This polygon falls primarily within Tweedsmuir Provincial Park. High First Nations interest. Adventure associated product: Backpacking, "randonneur" mountain biking, air tours (access), horse or llama assisted.
7	Focus: Rainbow Ridge Staging Area: Bella Coola Valley The Rainbow range is a rolling terrain with lakes and extensive alpine. Winter conditions provide tremendous opportunities for winter activities and is popular with snowmobilers. This polygon falls within Tweedsmuir Provincial Park. Adventure associated product: Ski tours
8	Focus: Monarch Glacier and adjacent Icefields. Staging Area: Bella Coola Valley Extensive icefields and glaciers punctuated by steep jagged peaks make this unit dramatic and unforgettable. Adventure associated product: Ski mountaineering, backcountry ski touring, Air tours (access).

Mid Coast Tourism Opportunity Study

Adventure Tourism Suitability


BRITISH COLUMBIA
N
Unit 6
Unit 2
Kitlope Heritage Conservancy
Tweedsmuir (North)
Unit 3
Tweedsmuir (South)
Unit 5
Unit 1
Unit 4
Hakai
1
2
3
4
6
6
7
8
9
Legend
Adventure Tourism Ranking
High Suitability
Moderate Suitability
Base Features
Forest District Boundary
Units
Accommodation Facility
Campsite
2+ Lane Forest Road
2+ Lane Loose Road
1 Lane Loose Road
Rough Road
Rail Line
Water Feature
Marine Mammal Wildlife Viewing
Alpine Tundra
Significant Views
Protected Area
Kilometers

Note

High potential polygons often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

6.10 Air tour

6.10.1 Resource Assessment

Description

The Air Tour Product is associated with scenic touring as well as providing access to and opportunities for mountain biking, paragliding, hiking, skiing and fishing. It utilizes the diversity of helicopters and the affordability of fixed wing aircraft. It has two components:

- An *air tour* allows tourists an opportunity to view surrounding landscapes while experiencing flying. The tours are best limited to an hour for most passengers, for reasons of comfort. Dramatic landscapes or diverse features are essential.
- The *air access tour* contains an air tour component but it is primarily to get recreationists to where they want to be. The turn around time from the base to the delivery area should be done within the shortest time possible. It is most suited for the helicopter. The access tour can deliver fishermen to the best fishing hole and, if need be, instantly transfer them to another hole. Mountain bikers and hikers can be delivered to the summit to enjoy the alpine/subalpine ridges and can be picked up or may return by trail. They may take a picnic lunch. Heli-skiing and paragliding activities require drop off at the summit of pristine snowfields, pickup at the base of the hill and then a drop off once again at the summit. The access tour is most profitable where the features are within a 15 minute flight of the base camp or airfield.

To determine the relationship of the features to the base camp or airfield the following criteria were identified:

- air tour operators must be diversified between tourism and industrial use in order to remain viable;
- an air tour product should not take longer than one hour and at average speeds of up to150 km per hour, a 60 km radius from the center is optimal for circle tours; and,
- the greatest and most profitable opportunities lie where the features are closest to the base camp or airfield.

Table 6.10-1: Region SWOT Analysis for Air Tour

Strength	Scenic recreation features suitable for air tour. Suitable activity opportunities close to staging areas.
Weakness	High precipitation and inclement weather. Remoteness from population centers and cost to get to the staging areas. Lack of supportive infrastructure. Wildlife are incidental and air touring may disturb those in visible areas. Environmental concerns with activities utilizing air access to subalpine/alpine ridges.
Opportunity	Expanding on existing opportunities (such as freshwater fishing), complimenting the road and marine tour products, growth of heli-skiing industry in BC
Threats	Land use uncertainties, lack of community support, declining industrial base.

Air Tours and the Mid Coast

The Mid Coast has geographical features well suited for the air tour product. The rugged coastline, dramatic peaks of the coastal mountains, the steep fiords, the scattered lakes, rivers, the immense icefields and overall scenery provide a tour with a variety of scenic experiences. Certain staging areas (communities, base camp or airfield) are closer to the coastal geography, while others are better associated with the high country. To best determine the relationship of the features to the staging area, a 60 km[1] radius was drawn on the map around several chosen staging areas. The staging areas were determined by their ability to attract tourists, their close linkage to industrial opportunities and availability of required infrastructures. The following discussion identifies the **staging areas** and links the recreation resources within a 60 km range.

- *Klemtu:* Air tours originating in Klemtu can provide a circle tour of the scenic Inside Passage, Anchor/Canoona Lakes, Laredo Inlet and the outer coast. This tour would provide a variety of scenic landscapes, from steep rock cliffs to rolling lake and bog pocketed coast. Heli-fishing access can be linked to the lakes and the small river and creeks of Roderick and Princess Royal Islands and mainland section.
- *Bella Bella/ Shearwater/ Denny Island:* Air tours from here can be linked to the coastal areas and can include a trip to Roscoe Inlet, Ellerslie Lake, Spiller, Bullock and Troupe passage. Heli-fishing access can be linked to the lakes and the small river rivers and creeks of Roderick and the mainland section extending from Spiller Channel south to include, among others, the Koeye and Clayak Rivers.
- *Rivers Inlet Fishing Lodges/ Dawsons Landing:* Air tours can be linked to the coastal areas and Cape Caution. Heli-fishing access provided on the small river rivers and creeks of mainland extending from Koeye to the north and the Kilbella, Chuckwalla to the Oweekeno watershed to the east.
- *Oweekeno:* Air tours can be linked to Owikeno Lake, coastal areas and Cape Caution. Heli-fishing access can be the small rivers and creeks of mainland extending from Koeye to the north and the Kilbella, Chuckwalla to the Oweekeno watershed to the east. A hiking/picnicking opportunity may be linked to Sheewahant Hotspring. The steep logging roads in a number of the watersheds may be suitable for mountain biking.
- *Ocean Falls:* An air tour can access the headwaters of the Kitlope River, the scenic Burke and Dean Channels, Roscoe Inlet and sections of the outer coast. Heli-fishing access can be linked to the lakes and the small river rivers and creeks of Roderick and the mainland section extending from Spiller Channel south to include among others, the Koeye and Clayak Rivers.
- *Bella Coola/Hagensborg:* The glacier / waterfall tour that include Hunlen Falls, Turner Lake Chain and the Monarch Icefield is dramatic and the premiere choice for tours in the District. There are opportunities for touring the Dean Channel and circling back over the peaks to Bella Coola. Fishing tours can include the Dean, Noieck, Taleomy, Tsea, and Washwash Rivers. Hiking and mountain biking tours can be linked to the trails and logging roads in the mountain surrounding the Bella Coola Valley. Paragliding access tours can provide quick dropoff onto the ridges surrounding Bella Coola. The Turner Lake Chain in Tweedsmuir Provincial Park falls within the 60 km radius and campers and canoeists can be dropped off/picked up here. There appear to be good opportunities for heli-skiing in the coastal mountain range – at least one operator is presently interested in developing this opportunity.

---

[1] The assumption is that a one hour flight would travel no more than 120 km.

Wildlife viewing on the Mid Coast is limited. Although present, the wildlife are may not be consistently viewed and where there is an opportunity for viewing, the chances to disturb the wildlife is great and must be strictly considered.

6.10.2 Market, Economic and Social Assessment of Air Touring

Competition

There are six air transportation companies that are either based on the Mid Coast, or have operations there. Three of the companies – Bella Coola Air, Pacific Coastal Airlines and Sharp Wings – are fixed wing air charters. The other three – Rainbow West, Vancouver Island and West Coast Helicopters – are helicopter charters. All of these companies diversify their services among industrial use, general transportation, emergency use and tourism. Tourism business is concentrated throughout the summer months, and generally has two components:

- transporting sportsfishers to the various lodges of the Mid Coast; and,
- "walk in" business seeking an air tour of the area, or specific sites.

A large proportion of helicopter tourist travel is comprised of fishers destined for the Dean Channel, where the landing strip is now out of commission, rendering it unsuitable for fixed wing aircraft. Fixed wing tours cost approximately $220 per hour, while helicopter tours range in price from $320 to $450 for a 20 minute ride (4 or 6 seat craft).[2]

It is our understanding that the air charter industry is competitive, especially during times of downturn in the forest industry.

Market Assessment

Air tours can be categorized as a soft adventure product, appealing largely to people interested in sightseeing, nature observation and wildlife viewing. Nature observation and wildlife viewing are increasingly popular activities in Canada and North America, and can be found wherever there is unique scenery or the opportunity to link with other products. It is not always possible, however, to view wildlife from the air, although operators can fly over known seal colonies or locations frequented by whales at certain times of the year.

Sportsfishers comprise a large share of tourism air travel to the Mid Coast during the summer months – one operator indicates that this is almost half of their summer business, with air tour clientele comprising another 10 to 15 percent of summer tourism travel. Another Mid Coast operator indicates that total tourism business (sportsfishers and others) makes up a total of 10 to 15 percent of their business. The market for sportsfishers and those seeking air tours are highly different. Sportsfishers generally book ahead and travel directly to the lodges with little or no stayover elsewhere on the Mid Coast, while "walk in" clients are drawn to the attractions of the area, or take an air tour as part of their trip through the region.

---

[2] These rates are as of March 2001, and are subject to change.

Those seeking a scenic tour often learn about the air tour companies through brochures obtained on the ferry, at hotels or at tourist information centres. Another effective marketing technique to attract clientele on good days (although we do not know if it used on the Mid Coast) is to display sandwich boards advertising charter services at the ferry terminals. This component of the tourism market is highly weather-dependent. The variability of weather makes it difficult to plan trips in advance, and so operators generally take same-day bookings during the summer. As one local air charter operator says, "We don't take them out unless we are pretty damned sure they will enjoy their trip".

The market for air tours varies depending on where in BC the air tour operation is based. One operator on the Mid Coast indicated that many of her customers are American, European (especially German) or Japanese, with considerable disposable income. These clients are generally FIT (free independent travellers), and often couples. In contrast, a tour operator in Squamish who offers helicopter tours of a glacier informed the consultants that there is no particular age or income profile for his clients, who range in age from babies to the elderly. This suggests that those willing to travel longer distances for a northern air tour experience are likely to be older and more affluent. Moreover, a weakened Canadian currency gives international visitors a cost advantage.

The outlook for tourism-based air charter business is positive in BC, however it is a competitive market on the Mid Coast. One air tour operator on the Mid Coast indicates that the market has been growing, and that this trend will continue. Their company's business doubled last year, and is expected to double again this year, although much of this can be ascribed to the sportsfishing industry. Another operator describes their air tour business as "steady". There is also potential longer-term growth in providing flying services to heliskiiers. In the winter of 2000, ten skiiers used a local helicopter service to gain access to the local mountains around Bella Coola. This niche has the potential to grow and, with it, the demand for air charter services on a year round basis.

The market for air tours appears to have considerable potential, particularly as the North American and European population ages and as travellers continue to be interested in viewing unique scenery and features in an exciting way.

Land Use and Planning Impacts

Existing Recreation Uses

Air tours are generally compatible with other recreational uses, although recreationists and wildlife on the ground are sensitive to noise from aircraft. Low fly-overs are prohibited in certain provincial and federal parks.

Wildlife Concerns

Increasingly, the use of aircraft for wildlife viewing is discouraged. Wildlife concerns may make helicopter operation impractical or impossible in some areas, likewise landing of aircraft may be prohibited in some park areas.

Other Land Uses

Site specific compatibility may be a concern where the aircraft frequently lands within sight of other recreational users – for example those engaged in wildlife viewing – or where First Nations undertake kelp gathering and other traditional uses

Community Use or Planning

Air tour operations generally fit with the planning goals of most communities.

Employment Impacts

Airplane and helicopter operations employ several workers on a year round basis but only a small share of their work is related to air tours. Given the large capital cost of starting up and operating an air tour business, it is necessary to diversify into other uses, such as charter flights for regional transportation, and to support forestry, mining or fire suppression, in order to operate year round. During the summer months a tour operation will create additional employment for pilots, ground crew, dispatcher, and clerical/booking agent. Most of these positions require a high level of training and skills.

Regulatory or Crown Tenure Requirements

Air tour operators would require a tenure or permit from BC Assets and Land Corporation for a landing site or a dock where they take passengers on. Lakes are presently excluded from this policy. Park use permits are required for provincial parks.

Helicopter operators can and do serve backcountry skiers by flying them to base camp locations, and this does not require a Commercial Recreation tenure. Actual heli-ski operations will require a CR tenure and very likely a guide service.

Level of Community Support

Consultation with specific communities may be required if an operator wants to fly over, or land near, culturally or historically sensitive sites. Unless being developed by the local First Nations, permissions should be obtained from the First Nation in whose traditional territory the operation is being developed. Specific negotiations will be required if infrastructure is to be developed near a site of cultural or historic significance.

Infrastructure Requirements

It is not likely that new aircraft operations would start up on the Mid Coast to serve the tourism market. Instead, existing operations would need to invest in additional up-front costs such as marketing a new image, hiring guides, etc.

General Capital Requirements

Startup costs for an air charter business are high. They include the purchase of a plane or helicopter and establishment of a flight base. Typical helicopter prices range from $500,000 to $1.2 million for a 4 seater craft, to $1.7 million for a 6 seater helicopter. It is unlikely that a tourism operator would be prepared to make an investment of this magnitude, particularly in a market that is already competitive.

Table 6.10-2 analyses each geographical unit using resource, market, economic and social criteria. The rationale for the boundaries of these geographic units is discussed in Section 5.2 of this report. Areas with the highest potential for the Air Tour Product have been identified as *polygons* on the map and are described in Table 6.10-3.

Monarch range: photo by Warren Fox

Table 6.10-2: PRODUCT ANALYSIS TABLE: AIR TOUR

Unit Name/Number		Outer Coast (1)	Fiords & Lakes(2)	Channels (3)	Oweekeno (4)	Mountain and Trade Routes (5)	Princess Royal Island (6)
Resource Criteria							
Uniqueness of Key Features	Setting Naturalness	High	High	High	Medium	High	High
	Dramatic Feature Grouping	Medium	High	Medium	Medium	High	Medium
	Wildlife	Medium	Low	Low	Medium	Medium	Medium
Supportive Resources	Peaks and icefileds	Low	High	Medium	Medium	High	Low
	Rock faces	Low	High	High	High	High	High
	Fish Creek / Rivers	High	High	Medium	Medium	Medium	Medium
	Rolling ridges	Low	Low	Low	Low	Medium	Low
Existence of Supportive Infrastructure		Low	Low	Low	Low	Low	Low
Associated Products		Hiking, ski tour, adventure, freshwater fishing, cultural interpretation					
Significance of Associated Products		Medium (fishing)	Medium (fishing)	Low	Low	Medium (adventure, ski tour, hiking)	Medium (fishing)
Access to Staging Areas		High	Medium	Medium	High	High	Medium
Access from Staging Area to Resource		High	High	High	Medium	High	Medium
Prime Season		Spring – Fall	Spring - Fall	Spring - Fall	Spring – Fall	Spring - Fall	Spring – Fall
Resource Discussion		- Moderate opportunity with the highest opportunity linked to fishing. - Air tours of the outer coast lacks dramatic features. - Moderate fishing. - Possibilities for whale spotting.	- High opportunity - This unit has dramatic landscapes and numerous creeks and lakes suitable for fishing.	- Moderate opportunity - This unit has dramatic landscapes and hotsprings but lacks diversity.	- Moderate tour opportunity. - Linkage to hotspring. - This unit has dramatic landscapes although sections exhibit timber harvesting.	- High scenic tour, fish and adventure opportunity - This Monarch Icefields, Hunlen Falls and other significant features within and around the Bella Coola Valley provide the most dramatic landscapes in the Mid Coast.	- High scenic and fish opportunity - This unit has dramatic landscapes and numerous creeks and lakes suitable for fishing.

Communities Most Able to Benefit	Bella Bella, Klemtu, Shearwater, Dawsons Landing	Bella Bella, Shearwater, Ocean Falls	Bella Coola, Bella Bella, Ocean Falls, Namu	Dawsons Landing, Oweekeno	Bella Coola	Klemtu, Hartley Bay

Market, Economic and Social Criteria							
Unit Name/Number		**Outer Coast (1)**	**Fiords & Lakes(2)**	**Channels (3)**	**Oweekeno (4)**	**Mountain and Trade Routes (5)**	**Princess Royal Island (6)**
Level of Competition		High	High	High	High	High	High
Market Demand Potential		Medium to high	Medium to high	Medium	Medium to high	Medium to high	Medium to high
Impact/ Conflict	Existing Recreation Use	- Generally compatible with other uses, although may be noise/visual impacts on other recreationists or wildlife					
	Other Land Uses	- Site specific visual/noise where aircraft lands; possible impact on First Nations traditional use					
	Community Use or Plans	- fits with Heiltsuk plans - Kitasoo: unknown - Oweekeno: unknown	- fits with Heiltsuk plans - Ocean Falls & Kitasoo: unknown	- Heiltsuk:: fits with plans	- Oweekeno: unknown	- Bella Coola, Hagensborg: fits with plans - Nuxalk: unknown	- Kitasoo: unknown
	Environmental	- Site specific: low to medium impacts on bear, mountain goats, other wildlife					
Local Employment Impacts		- seasonal employment; generates small number of skilled to highly skilled jobs					
Regulatory or Crown Tenure Requirements		- Air tour operators will require permit or tenure for a landing site or a dock where they take passengers on.					
Level of Community Support		- Heiltsuk: positive - Kitasoo: unknown	- Heiltsuk: positive - Ocean Falls & Kitasoo: unknown	Heiltsuk: positive	Oweekeno: unknown	- BellaCoola, Hagensborg: positive - Nuxalk: unknown	- Kitasoo: unknown
Infrastructure Requirements		- Aircraft, landing base, possible docks or landing strips at landing site					
General Capital Requirements		- High					
POLYGONS EXHIBITING HIGHEST POTENTIAL		**5**	**2, 3, 4**	**8**	**7**	**8,9**	**1**

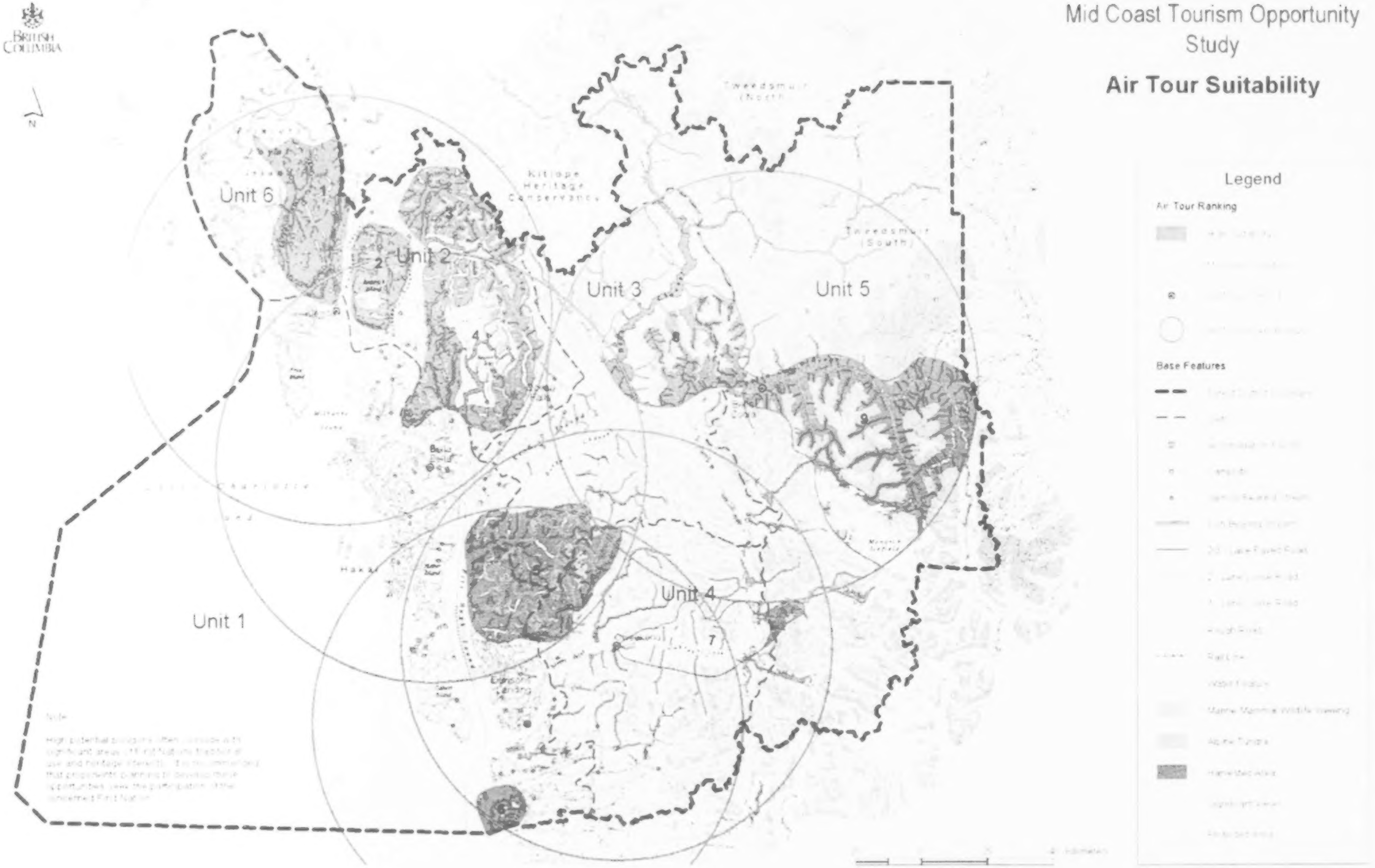
Refer to Table 6.1-1 for definition of foregoing criteria. See next page for definitions of highest potential polygons.

Table 6.10-3: Descriptions of Highest Potential Polygons for Air Tour Product

Polygon Number	Description of Polygon
1	Focus: Princess Royal Staging Area: Klemtu. This polygon falls within the "Spirit Bear Rainforest". The tour from Klemtu can link mysterious Laredo Inlet, the high scenic values of Anchor and Canoona Lakes and the scenic Inside Passage (and Khutze Inlet, Green Lagoon). High fishing values in a number of rivers with a focus on Canoona and Anchor Lakes (steelhead). Polygon has a high First Nations significance (Kitasoo). Air tour associated product: Tours, fishing, wildlife viewing, cultural interpretation.
2	Focus: Roderick Island Staging Area: primarily Klemtu , also Ocean Falls, Shearwater, Bella Bella. Many rivers and lakes with high fish presence. Roderick Lake has high scenic values. Air tour associated products: Tours, fishing cultural interpretation.
3	Focus: Fiordland Provincial Park Staging Area: Klemtu. Very scenic area that includes towering rock cliff faces and high snow capped peaks. Air tour associated products: Tours, fishing.
4	Focus: Roscoe and Ellerslie Staging Area: Bellla Bella, Shearwater, Ocean Falls, Klemtu. Very scenic areas with lakes and rivers identified as fish bearing. Polygon has very high First Nations significance (Heiltsuk) Air tour associated products: Tours, fishing, cultural interpretation.
5	Focus: Mainland Namu, Koeye to Moses Staging Area: Bellla Bella, Shearwater, Ocean Falls, Klemtu. Very scenic areas with lakes and rivers identified as fish bearing. Polygon has very high First Nations significance (Heiltsuk) Air tour associated products: Tours, fishing, cultural interpretation.
6	Focus: Cape Caution and Blundell Bay Staging Area: Bellla Bella, Shearwater, Ocean Falls, Klemtu. World Class beach, potential for whale sightings. Air tour associated product: Tours, fishing, cultural interpretation.
7	Focus: Oweekeno Lake Staging Area: Oweekeno Very scenic lake culminating in the Sheemahant Hotspring (presently undeveloped). Fish Bearing rivers and creeks. Air tour associated products: Tours, Destination lodge, fishing, cultural interpretation.
8	Focus: Dean Channel to Kimsquit Staging Area: Primary Bella Coola, Ocean Falls. Scenic fiord that leads to the estuaries of Kimsquit and Dean. Also includes the snow capped peaks of the coast mountains. Air tour associated products: Tours, destination lodge, fishing, cultural interpretation.
9	Focus: Dean Channel to Kimsquit Staging Area: Bella Coola. The scenic Bella Coola Valley to Rainbow Range, Hunlen Falls, Turner Lake chain, coast mountains and the Monarch Glacier. Possibly **the most scenic tour in the Study Area.** Air tour associated products: Tours, adventure (mountaineering, ski tour, paragliding, downhill mountain biking) and heli-skiing.

Mid Coast Tourism Opportunity Study

Air Tour Suitability


BRITISH COLUMBIA
N
Unit 1
Unit 2
Unit 3
Unit 4
Unit 5
Unit 6
1
2
3
4
5
6
7
8
9
Kitlope Heritage Conservancy
Tweedsmuir (North)
Tweedsmuir (South)
Hakai
Bella Bella
Legend
Air Tour Ranking
Base Features
Rail Line
Water Feature
Marine Mammal Wildlife Viewing
Alpine Tundra
Harvested Area
Kilometers

Note

High potential products often coincide with significant areas of First Nations traditional use and heritage interests. It is recommended that proponents planning to develop these opportunities seek the participation of the concerned First Nation.

7 ISSUES AND ACTION PLAN

7.1 Introduction

The previous sections of this report describe the context and resources of tourism on the Mid Coast, and carry out a product analysis with the objective of identifying the most promising resource-based opportunities. Having done this, the next steps are to:

- review the important issues that affect Mid Coast tourism and will shape its future development; and,
- outline a tourism action plan to start developing the tourism opportunities identified herein.

The approach in this tourism action plan is to identify action items at three levels of detail, ranging from general to specific:

- the **product-based** recommendations focus on what steps are required on a product-by-product basis, for the outer and inner Mid Coast communities;
- the **regional action plan** addresses matters that affect all communities, such as marketing and product development;
- in the pre-feasibility analyses of Section 8, recommendations are made for developing three **specific opportunities** – a marine cruise and canopy walk at Roscoe Inlet, a hut to hut guided kayaking tour, and a road tour in the Bella Coola Valley.

This approach provides a variety of perspectives, and acknowledges that different readers have different interests. In addition, the opportunity-specific recommendations in Section 8 provide a framework for evaluating these three opportunities -- and any others -- that may be considered in the future.

7.2 Issues Overview

This project and other research have shown that there is a steadily growing global market for adventure and wilderness-related tourism products, and that the Mid Coast is well positioned to attract a share of this market. The key development challenges are to:

- identify and prepare the most promising products for the market;
- establish the local commitment to realize these opportunities;
- develop quality products that will be competitive with existing products offered both within and outside the Mid Coast; and,
- attract the financing and investment capital required for the development of suitable tourism opportunities.

The consultants have heard from numerous community stakeholders regarding their goals and objectives for the tourism sector on the Mid Coast. The key community challenges are to:

- develop adventure products in a manner that protects community values (ie., environmental and cultural) and maximizes community participation in terms of ownership and employment;
- retain a large proportion of the economic benefits of tourism development within the local communities;
- implement tourism development in a manner that is sustainable and that fits with overall community social and economic objectives; and,
- implement tourism development in a way that protects First Nations heritage and traditional use sites.

7.2.1 Issues Scan

General

Several key issues were brought to the attention of the project team through research, analysis or as direct input from community members and tourism industry professionals. The project team believes that these issues should be addressed in the course of product development planning -- whether undertaken by public or private interests -- if the Mid Coast is to build its tourism industry in a manner consistent with community and tourism industry needs. The following points raise some key tourism-related issues identified during this study.

- Most Mid Coast communities have identified tourism as a key future economic activity and are working on specific tourism initiatives. The communities recognize the utility of economic diversification into tourism, and have clearly expressed to the project team a desire to have tourism contribute to the local economy.

- Local residents, including those not directly employed by the tourism industry, need to show support towards tourism development. Some locals remain skeptical about the value of tourism and transmit a negative or indifferent attitude towards tourists. Communities need to be apprised of the merits of tourism and its positive economic impact on a region. Communities also need to have discussions to explore solutions to local concerns.

- To gain community support, tourism development should occur at a pace that is good for the community as well as the environment. Limits of acceptable change should be examined as part of any outdoor recreation-based tourism development proposal. Local residents maintain a strong sense of ownership or stewardship of the region's resources and wish to maintain a degree of control over how those resources are used. Residents and tourism operators are also concerned regarding the environmental impact of current and future beach use by tourism operators and the impacts on traditional food fishery areas.

- In the remote communities of the Mid Coast there is generally a lack of knowledge regarding how to access funding, and a scarcity of local mentors who have developed successful business ventures. To find entrepreneurs with the required knowledge and expertise, the Mid Coast communities, entrepreneurs, and/or economic development organizations may have to look outside the region, at least in the short term. Investors, entrepreneurs, educators or management staff from outside can bring valuable resources, experience and information that will help build a vibrant tourism industry, and contribute to a high level of quality and service. Shared values, good communication and a working relationship between entrepreneurs and the local community will be essential in ensuring that the benefits of new tourism ventures are realized locally.

- Several communities on the Mid Coast are presently developing or planning a range of tourism products. These communities should work collaboratively to develop connected and complementary products to offer the touring public. For example, several First Nations communities on the North Coast and Mid Coasts are either planning or developing traditional lodges as a tourism draw. Visitors to the Coast are likely to see heritage/cultural products as a "homogeneous" product, and the various communities may be forced to compete with each other for market share. However, by marketing cultural tourism jointly as a region, and presenting the various lodges as complementary products, the First Nations of the Coast will gain access to a larger market and reduce marketing costs. It will be important for competitive reasons to create a stronger regional "brand" and coordinate tourism activities to maximize on each others' strengths and opportunities.

- Some communities of the Mid Coast have identified poor local representation by government agencies and government bureaucracy as barriers to effectively moving tourism opportunities forward in a timely and efficient fashion. This has on occasion blocked investments or made it difficult to secure the necessary funding for tourism development.

- Further development of the products and the associated infrastructure (e.g., local accommodation, suppliers and equipment) is required before tourism products located outside the Bella Coola Valley and Shearwater can be marketed for the Mid Coast. It will be difficult to arrange financing, or attract investment, without demonstrating that the required infrastructure is present to support the tourism product Moreover, tourism brokers and agents focus their efforts on products which are ready ***now***, and not those which are still developing.

- This consideration is what is driving the Heiltsuk initiative to build a hotel in Bella Bella, in order to provide high quality accommodation and to serve as a jumping-off point for visitors to attractions such as the proposed canopy walk in Roscoe Inlet, or guided kayaking tours.

- The ferry service to the communities of the Mid Coast is critical to tourism development. Mid Coast communities are concerned that their interests are not sufficiently represented in the decision-making process for the Central Coast ferry service. Chronic uncertainty about future ferry service makes it difficult for local tourism businesses to plan and market themselves as a tourism destination area. For example, local tourism providers need to know the summer 2003 ferry schedule by Christmas 2002 in order to market at European and other trade shows for the following summer.

- Some of the products identified in this report will require a significant capital investment. Clearly, attracting this kind of capital will be a challenge. An investor will be seeking the best return on investment and minimal risk exposure. The investment decision will be influenced by factors such as the market for the product, the competition, the security of the land base, the location of the venture, and the entrepreneur's experience in the sector. Community and government support will be necessary to create a favourable investment climate.

First Nations Issues

Many of the foregoing concerns are shared by both First Nations and non-native communities alike. However, specific issues pertaining to First Nations interests arose during the course of the project. These are summarized below.

- In the past, commercial tourism operators have used, or infrastructure has been built on, First Nations cultural or traditional use sites without consulting the affected people, and this has created hard feelings on the part of First Nations.

- Most of the First Nations involved in this project are concerned that tourism development will continue to take place on their traditional lands without their involvement. Presently, there are several non-local operators who offer tours of the Mid Coast (primarily kayaking and nature observation). Many First Nation people see this as an unsolicited use of their traditional lands. There is also a feeling of being "scooped" by outsiders, as most First Nation people do not have the resources or information to build their own tourism products locally. This concern has been intensified by the advent of world attention on the Great Bear Rainforest. The First Nations people of the Mid Coast have indicated that they wish to control, or seek ways to be involved in, future tourism development in their region. First Nations want respect for their resources and land, and a protocol established for revenue-sharing for new tourism initiatives on their land.

- First Nations communities on the Mid Coast need to build capacity locally in order to capitalize on and participate in new tourism activities. Given that many of the local entrepreneurs in First Nations communities have traditionally focused on the fishing industry, they are still making the transition to tourism development. To date, there are still only a few locally established tourism operators with limited resources to develop opportunities.

- At the regional level, there is a long history of mistrust and a lack of coordination and cohesion that is probably causing real harm to tourism development in the region as a whole. There is a strong need for an empowered umbrella organization that can satisfy the participants that it is effective and representative of their interests.

- The Heiltsuk, Nuxalk, Kitasoo/Xaixais, Oweekeno and Gwasala First Nations are now considering the establishment of the Central Coast First Nations Tourism Consortium, in order to address the following matters:

  - maximizing tourism benefits to local communities;
  - managing growth, and the location of tourism;
  - working with non-First Nations tourism operators;
  - developing a protocol for First Nations and industry to explore partnership opportunities; and,
  -

  - addressing a range of other tourism-related issues such as ferry service, marketing, resources and communications.

- Any consortium or regional organization representing First Nations should establish a working protocol to govern decision making and operations. Suggestions for the protocol include the following:[1]

  - Each member of the Consortium should have equal representation.

  - A quorum structure should be established to ensure that all members are present and involved in the discussions. This may incur more costs, particularly when face-to-face meetings are necessary, but the approach has been successful in fostering harmony and a spirit of cooperation in other organizations.

- The Kitasoo/Xaixais have developed a Land Use Plan and Environmental Protocol for their Traditional Territory, completed in 2000. The Kitasoo/Xaixais expect all current and future users of their Traditional Territory, including tourism operators, to consultant with the Community of Klemtu, Chiefs and Councils. The protocol indicates that operators must gain Kitasoo/Xaxais permission before any activities are carried out in their Traditional Territory. A protocol agreement must be developed between the Kitasoo/Xaixais and any operator, which provides meaningful benefit to Klemtu. The Kitasoo/Xaixais also expect users to adopt their land use plan and show respect for their people, government, environment and resources.

- As of April 4th, there is a General Protocol Agreement between the First Nations of the Central and North Coast, as well as the Haida Gwaii, and the provincial government. This will enable each of the First Nations to negotiate their own Interim Measures Agreement on land use planning with the provincial government.

7.3 Product Action Plan

The Tourism Opportunity Study for the Mid Coast Forest District has identified several specific tourism products with high development potential. The action plan, which has been developed from a community economic development perspective, outlines the preliminary steps that could be taken by communities, economic development agencies or entrepreneurs to advance the development of these products. Clearly, undertaking a tourism (or any other) business initiative involves many tasks – the objective of this plan to is identify the first steps required for each of the opportunities.

The recommendations for product development are made for the outer Mid Coast and the inner Mid Coast separately. Some product opportunities, of course, span both areas. It is also noted that steps for developing the heritage/culture product have been excluded from this action plan. Throughout this report, heritage/culture resources (both First Nations and non-native) have been identified as important and integral to most of the other products evaluated. In addressing the other tourism products, the following action plan also effectively covers heritage/culture without focusing on specific locations or sites. It lies within the purview of all the Mid Coast communities to determine when and how they will choose to pursue the development of their heritage resources for tourism.

---

[1] Suggestions by Keith Hamilton, Bella Bella Community Development Society.

7.3.1 Outer Coast

Ocean kayaking

The best opportunities for ocean kayaking tours on the Mid Coast Forest District are located on the outer coast (Swindle Island, Bella Bella, Hakai, and at Namu and Dawsons Landing), Fiords and Lakes (Ellerslie Lake/ Roscoe Inlet), and Princess Royal Island (Butedale/Laredo and Cornwall Inlet) units. The outer coast is already frequented by some of the bigger kayaking guiding operations in BC. These companies typically operate from Vancouver Island or from mother ships and offer trips generally lasting from five to ten days in duration. There are also many independent kayakers who travel to the area on BC Ferries.

- **Objective:** To develop ocean kayaking venture(s) that would be based in and operated from local communities on the outer coast. These ventures would typically be guided, multi-day ocean kayaking trips that focused on accessing one or more of the specific areas identified in the resource analysis.

- **Status of Infrastructure:** Presently there is little infrastructure on the outer coast to support this industry. The Discovery Coast ferry service regularly serve the outer coast communities during the summer months, transportating many kayakers to and from North Vancouver Island. Kayakers visiting the Mid Coast either bring their own kayaks, or obtain them from rental shops on the North Island. There is nowhere on the outer Mid Coast to rent kayaks, or obtain guides or instructors. Most outer coast communities either have existing hut or lodge infrastructure that could be used to support multi-day excursions, or are now contemplating the development of this type of infrastructure.

- **Ancillary services:** The First Nation communities on the outer coast have minimal accommodation capacity locally, although each has one or two bed and breakfast operators, while in Shearwater there is a well-known lodge A successful kayaking industry on the Mid Coast would draw more visitors for overnight stays and fuel the demand for more accommodation in these communities. It could also support a kayaking rental and supply store, and there may also be the potential to develop catering and food services in association with ocean kayaking operations.

- **Potential development tasks:** The communities of the outer coast are currently exploring the development of ocean kayaking ventures. It will be important for new kayaking operators to work closely with the local communities to ensure that cultural and traditional uses are protected. The Heiltsuk have hut infrastructure in place while other First Nation communities are exploring hut development or lodge development for their communities. This infrastructure could be critical in the eventual establishment of quality ocean kayaking ventures. Key tasks for developing an ocean kayaking venture are as follows.

    - Identify specific kayaking products to be developed, and potential entrepreneurs who would have an interest in developing venture.

- Engage in community discussions to identify issues and concerns for ocean kayaking development, and to work towards agreement on how the venture could operate locally.
- Work with the entrepreneur or proponent to develop a protocol for resource management, and ensuring that the venture will meet community economic, social and environmental objectives.
- Explore partnerships between the community and other local or regional entrepreneur(s) to identify shared opportunities such as connecting other resorts, lodges or hut sytems to ocean kayaking ventures.
- Undertake a thorough market assessment to estimate how many clients could be expected in the first, and subsequent, years of operation.
- Produce a business plan for the local ocean kayaking venture as a prelude to obtaining financing.
- Consider collaboration and/or partnering with existing tourism operators in and outside the Mid Coast for marketing and logistical support.

Nature Observation

On the outer coast there is good potential for bear viewing opportunities on Princess Royal Island (particularly the rare Kermode Bear). The staging areas for nature viewing on Princess Royal Island would be Hartley Bay and Klemtu.

- **Objective:** To develop nature viewing venture(s) that would be based in and operated from either Klemtu and/or Hartley Bay. This activity would typically be a multi-day tour experience and could be linked to other tourism products such as ocean kayaking or marine cruising.

- **Status of Infrastructure**: The communities of Hartley Bay and Klemtu are currently exploring tourism products, however, there is currently little infrastructure in place. The community of Hartley Bay is now building a lodge in Cornwall Inlet on Princess Royal Island that could be used as a staging area for wildlife viewing activities.

- **Ancillary services:** Klemtu and Hartley Bay have minimal accommodation capacity locally but both communities are working to address this issue. There may be the opportunity to link other tourism products and local services to this venture.

- **Potential development tasks:** The communities of Klemtu and Hartley Bay are currently working on tourism product development associated with Princess Royal Island.

Marine Cruising

Marine cruising could take the form of multi-day or day circle tours and linear marine cruises. The best marine cruising opportunities on the outer coast are identified as:

- a linear cruise between Rivers Inlet, Koeye, Namu and Bella Bella;

- Fiordland multi-day pocket cruise from Bella Bella, Shearwater, and Ocean Falls; and
- Owikeno Lake multi-day cruising experience.

Currently there are approximately four operators (all based on Vancouver Island) offering a marine touring product on the Mid Coast, although several fishing charters offer this as a secondary activity locally.

- **Objective:** To develop marine cruising venture(s) that would be based in and operated from communities of the outer coast by local residents.

- **Status of Infrastructure:** There are underutilized boats in most of the coastal communities, some of which could be modified or upgraded to transport passengers. It may also be necessary to purchase boats. The type of vessels required will be determined by the distance and wind/water conditions. In addition to investing in boats and equipment, infrastructure would need to be developed or arranged by the entrepreneur to support the actual operation of a marine touring venture – e.g., docks or mooring buoys at the key locations. (Refer to the pre-feasibility analysis of a marine cruise and canopy walk at Roscoe Inlet in section 8.)

- **Ancillary services:** To successsfully draw visitors to communities outside Bella Coola, good quality accommodation should be made available in the community, or else provided by the operator. Like the kayaking product, there would be the potential to develop catering and food services in association with marine cruise operations.

- **Potential development tasks:** These are similar to the steps outlined for ocean kayaking business development.

Destination Lodges

On the outer coast several areas have the potential to be developed as a destination lodges in connection to various adventure tourism activities. Some of the best outer coast opportunities for destination lodges include the following.

- Pruth Bay and North Calvert Island -- Presently there is a fishing lodge in the area, however the the opportunity would be for a lodge that emphasizes ocean kayaking, boating, and hiking.
- Roscoe Inlet – a lodge here could be linked to Heiltsuk First Nations culture and a variety of adventure tourism activities, including a possible tree canopy walk (See Section 8 for discussion of this product).
- Eucott and Nascall hotsprings areas -- A lodge at these hotspring sites could be linked to numerous adventure tourism products, and a specialized spa.
- Owikeno Lake linked to Sheemahaut Hotspring could be linked to several adventure tourism products, First Nations cultural activities and a spa.

- Princess Royal Island in the Anchor Lake area -- The Hartley Bay community is developing a lodge in nearby Cornwall Inlet. However, the Anchor Lake area would provide opportunities such as steelhead fishing, First Nations cultural heritage and adventure tourism activities.
- The Koeye River Lodge situated on the mouth of the Koeye River, has recently been purchased by Warren and Peter Buffet, and ownership of the property will be transferred to the Heiltsuk.. Should the Heiltsuk choose to develop the lodge for tourism, it could be linked to products such as grizzly viewing and First Nations cultural heritage.

The development of a new destination lodge is typically expensive and requires careful assessment to determine its feasibility, and how it will fit into the community's overall tourism development.

- **Objective:** To develop a destination lodge(s) to support new or expanded adventure tour activities on the outer coast.

- **Status of Infrastructure:** There are several existing lodges on the outer coast, most notably the Shearwater Resort, the fishing lodge at Pruth Bay, and approximately ten fishing lodges in the Rivers Inlet area. These are accessible by boat or water plane. Each First Nation community on the outer coast is at a different stage with regard to considering or planning a destination lodge.

- **Ancillary services:** Very few adventure tourism products are presently offered by the communities of the outer coast. However, both the Heiltsuk and Kitasoo First Nations are both actively engaged in exploring the development of a variety of adventure tourism activities. As well, there are numerous established ocean kayaking and recreational fishing ventures currently operating in the area. As local entrepreneurs develop adventure tourism activities, the destination lodge could be used to support these activities. Proponents of new destination lodges may also want to forge partnerships with existing tourism operators in the area, and may want to consider the following community approaches.

- **Potential development tasks for Heiltsuk First Nations:** The Heiltsuk community is currently undertaking a feasibility assessment of constructing a lodge. The community and consulting team will outline their next steps once they have assessed its viability.

- **Potential development tasks for Kitasoo First Nations:** As the community of Klemtu explores and develops adventure tourism products, they will need to build the capacity for more visitor accommodation. Therefore, the community of Klemtu may want to consider the following tasks.
    - Determine what type of accommodation will best suit the needs of the clientele being targeted for the adventure products – are they comfortable with rustic accommodation and few amenities, or will they prefer full-service resort accommodation?
    - Determine the best strategic location for the accommodation or lodge, where it can maximize linkages to the largest number of tourism activities.

  - Engage in community discussions to identify issues and concerns for lodge development, including models for ownership, and a protocol for working with and sharing revenue with outside investors or operators.
  - Explore partnerships between the proposed lodge and other local or regional entrepreneur(s) to identify shared operating and marketing opportunities.
  - Undertake feasibility assessment and business plan to ensure that the lodge venture is viable, and a good investment from the perspective of lending agencies or funding partners.

- **Potential development tasks for Oweekeno First Nations**: The community of Oweekeno may want to consider the following tasks.

  - Determine if there is community support for a destination lodge product.
  - If the community chooses to pursue a destination lodge, it should determine acceptable models for ownership and management of the lodge.
  - If private investment funds are required, identify investors or entrepreneurs who are willing to pursue the development of a lodge jointly with the community of Oweekeno.
  - Explore partnerships between the community and other local or regional entrepreneur(s) to identify shared opportunities such as connecting other resorts, lodges or hut sytems to ocean kayaking ventures.
  - Undertake market assessment and business plan as a prelude to obtaining financing.

Hut-to-Hut

There are three areas on the outer coast identified with high opportunity for either marine or lake hut-to-hut systems. These are the marine area around the islands east of Bella Bella (Athlone to Campbell Island area); the Hakai Pass marine area (vicinity of Hunter Island); and Anchor Lake, Butedale Lake, and Canoona Lake area on Princess Royal Island.

- **Objective:** To develop hut-to-hut system(s) as a basis for various adventure tour activities (primarily ocean kayaking, nature observation, and marine cruising activities).

- **Status of Infrastructure:** The Heiltsuk First Nations have already constructed huts on the islands east of Bella Bella, primarily for community and traditional uses. These huts could also be used to support water-based adventure tours. Sites have been identified on the Hakai or Princess Royal Island sites, although Hartley Bay is developing a lodge in Cornwall Inlet on Princess Royal Island.

- **Ancillary services:** There is presently minimal accommodation capacity in the outer coast communities. As in the case of kayaking, a successful hut to hut tour industry on the Mid Coast would draw more visitors for overnight stays and fuel the demand for more accommodation in these communities. There may also be the potential to develop catering, food services and supply businesses in association with the hut product.

- **Potential development tasks for Heiltsuk:** The first steps towards developing the Heiltsuk system of huts are as follows. (Refer to Section 8, Pre-feasibility Assessment of Hut to Hut Ocean Kayaking Touring Around Bella Bella).
    - Determine if the Heiltsuk community supports the use of their hut system for tourism and if the huts are available often enough to support an adventure tourism operation.
    - Assess the type of tourism products that would be most compatible with the hut system, based on considerations such as time of availability, distance from communities, access to and from water, and amenities required.
    - Identify local/regional entrepreneurs or business operators who would want to pursue the development of this product.
    - Undertake a detailed business plan to outline the viability of the opportunity and secure financing if necessary. Financing may be required to construct additional huts.

- **Potential development tasks for Kitasoo:** These would be similar to those for the Heiltsuk, however the objective would be to establish a system of new huts.

Adventure

Adventure products appeal to enthusiastic recreationists seeking adrenaline experiences, and often require a high level of energy and fitness. On the outer coast, the only high opportunity activity is open water ocean kayaking, although there are low to moderate opportunities for rock climbing and mountaineering in the Fiords & Lakes, Channels and Princess Royal geographic units.

Open water ocean kayaking is presently carried out occasionally as part of the multi-day tours offered by some kayaking tour operators that operate on the outer coast. As it is highly dependent on wind and water conditions, open water ocean kayaking is difficult to plan for. Local knowledge about conditions and beaches is also essential for this form of kayaking. Thus, open water ocean kayaking in and of itself would likely not be the basis of a business. Existing and new kayaking operators can consider incorporating more of this activity into their tours if they wish to attract this market.

7.3.2 Inner Coast

Marine Cruising

On the inner coast a linear marine cruise could be established for the Dean and Burke channels. This area is surround by towering mountain ranges with rock outcroppings and bluffs that slope directly into the channel. As well, there are hotsprings that are suitable for a "hotspring" marine cruise. This cruise could begin in Bella Coola and then travel to either Shearwater or Bella Bella.

- **Objective:** To develop marine cruising venture(s) that would be based in and operated from Bella Coola.

- **Status of Infrastructure:** Bella Coola has a harbour that can be used by both small and large vessels, and a good range of services nearby. There are likely some underutilized boats in or near Bella Coola that could be modified or upgraded to transport passengers, otherwise it would be necessary to purchase boats. The type of vessel to be used is determined by the distance and wind/water conditions. In addition to investing in boats and equipment, infrastructure may need to be developed or arranged by the entrepreneur to support the actual operation of a marine touring venture – e.g., docks or mooring buoys at the hotsprings location, possible amenities for hotspring users.

- **Ancillary services:** There is a good array of accommodation and other services in Bella Coola. Part of the appeal of a marine cruise operation out of Bella Coola is the capacity for drawing more visitors to the downtown core and its harbour front. This points to longer term opportunities to develop supporting tourism attractions in Bella Coola, such as the river front, historical sites and the Nuxalk Village.

- **Potential development tasks:** The development steps of a marine cruising venture would be similar to those outlined under ocean kayaking.

Nature Observation

On the inner coast there is good potential for nature viewing opportunities in the Firvale area to the Anarko River and on the lower Kimsquit and Dean river areas. These areas have high grizzly bear viewing potential and a good diversity of other wildlife.

- **Objective:** To develop nature viewing venture(s) that would be based in and operated from the Bella Coola Valley. This activity would typically be associated with a multi-day experience and could be linked to other tourism products such as ocean kayaking or marine cruising.

- **Status of Infrastructure:** Most of key infrastructure for such nature viewing activities would available in the Bella Coola. The entrepreneur would need to invest in some additional infrastructure to support the tours – e.g., vehicle or boat, possible viewing platform(s).

- **Ancillary services:** The Bella Coola Valley has a good range of services to support nature viewing ventures. The valley has a good range of accommodation, an airport in Hagensborg, and road and ferry access to ensure regular transportation links for travellers.

- **Potential development tasks:** The community of Bella Coola could initiate the development of nature observation tourism products. This would include the following tasks:

  - Select the most promising nature observation opportunities, and determine how they could be packaged to maximize their market potential.
  - Undertake feasibility assessment for the specific opportunity.
  - If the opportunity is viable, identify businesses or entrepreneurs that may want to capitalize on the opportunity. This would likely require preparing a prospectus on the opportunity.

- Assist the interested business through the tenure application process.

Road Touring

In the Bella Coola Valley there is only one paved road (Highway 20) and several unpaved roads that would be suitable for road touring. Road touring could be linked to other types of products on the inner coast such as nature observation, marine touring, air tours and/or cultural heritage. While there are presently no businesses that offer road tours of the Bella Coola Valley as a primary product, there are conventional bus tours that travel the Bella Coola Valley as part of longer trips, and several tour package operators (e.g., Natural Habitat Adventures and, in the past, Elder Hostel) who include local road tours as part of a multi-day nature observation experience.

- **Objective:** To develop road touring venture(s) that would be based in the Bella Coola Valley. These would be small, personalized tour groups of no more than six guests, using a minivan. The trips would generally be four to six hours in duration.

- **Status of Infrastructure:** Existing and required infrastructure for a road tour product is evaluated in detail in Section 8 of this report (Pre-feasibility assessment of a road tour product in the Bella Coola Valley).

- **Ancillary services:** The Bella Coola Valley has a range of accommodation services that could be utilized by a road touring venture. As well, there are several restaurants and bed & breakfast establishments that may be interested in providing catering services and arranged sit-down meals. Road tours of the Valley would provide visitors with more exposure to its features and amenities, and could stimulate demand in other, ancillary businesses in the Valley.

- **Potential development tasks:** These are outlined in detail in Section 8 of this report (Pre-feasibility assessment of a road tour product in the Bella Coola Valley).

Destination Lodges

Presently, the most notable destination lodges on the inner coast are Tweedsmuir Lodge in the Bella Coola Valley, and a fishing lodge at the Dean River. The best potential for a new destination lodge linked to adventure tourism product would likely be at Tallheo Hotsprings in South Bentinck Arm. This area has a small beach and is the site of an old Nuxalk village. This site would ideal for cultural interpretation and marine cruising. Tallheo Hotsprings is an important area for the Nuxalk First Nations and may be an opportunity they would want to explore. Clearly, this choice will be determined by the preferences of the Nuxalk.

The Tallheo Cannery, which has several completed rooms and boat access, also has the potential to be a destination lodge.

- **Objective:** To develop a destination lodge that would support new adventure tourism activities on the inner coast and provide a venue for cultural heritage interpretation.

- **Status of Infrastructure:** There is a range of accommodation and services in the Bella Coola Valley, and a bed and breakfast establishment at the Tallheo Cannery across North Bentinck Arm from Bella Coola. Bella Coola would serve as a good staging area for a destination lodge at Tallheo Hotsprings.

- **Ancillary services:** As the adventure tourism product diversifies on the inner coast, visitors will seek a variety of other tourism products and services. The new destination lodges may be able to forge partnerships with existing tourism operators in the area to support product providers and other local services.

- **Potential development tasks:** The Nuxalk First Nations may want to consider undertaking the following tasks:

  - Determine what type of accommodation will best suit the needs of the clientele being targeted for the related adventure products – are they comfortable with rustic accommodation and few amenities, or will they prefer full-service resort accommodation?

  - Engage in community discussions to identify issues and concerns for lodge development, including models for ownership, and a protocol for working with and sharing revenue with outside investors or operators.

  - Explore partnerships between the proposed lodge and other local or regional entrepreneur(s) to identify shared operating and marketing opportunities.

  - Undertake feasibility assessment and business plan to ensure that the lodge venture is viable, and a good investment from the perspective of lending agencies or funding partners.

Adventure

There are more opportunities for adventure activities on the inner coast than the outer coast, and most of these would be in the Bella Coola Valley. The most promising activities are rock climbing, mountaineering, mountain biking, multi-day backpacking, paragliding, and windsurfing. Heli-skiing (linked to the air tour product) may also hold potential. These activities would generate income and employment locally, while attracting a diverse and interesting young market, and could be the basis for a cluster of new businesses (supplies, rentals and instruction) in the Bella Coola Valley. This could contribute to the image of the Bella Coola Valley as an "extreme" destination.

- **Objective:** To establish a cluster of adventure activity-related businesses in the Bella Coola Valley.

- **Status of Infrastructure:** There are no sports specialty stores or rental establishments for these activities in the Bella Coola Valley. Those seeking opportunities to climb, hike, cycle or do other activities are required to bring their own equipment from outside the area.

- **Ancilliary Services:** The Bella Coola Valley has a good range of services to support visitors seeking adventure experiences. The valley has a good range of accommodation, an airport in Hagensborg, and road and ferry access to ensure regular transportation links for travellers.

- **Development Tasks:** To develop an adventure product business, proponents must be thoroughly familiar with the resource, and take a realistic look at how it rates compared to similar resources elsewhere. The results of this report indicate that the 350 km land portion of the Alexander Mackenzie Heritage Trail holds particularly high potential for long distance mountain biking, and backpacking. In all likelihood, this feature would present the best starting pointing for building a business around extreme activities. Key tasks for development include the following.

  - Work with locals or other experts from outside the region (e.g., local paragliders, owners of paragliding schools, the Canadian Alpine Association, long distance cycling clubs) to identify which activities are the most promising and could compete with similar products offered elsewhere. If the winds in North Bentinck Arm are good for windsurfing, but not as reliable as those in the Gorge (Oregon) or Squamish, then it could be difficult to attract the critical mass of windsurfers needed to support a business. Heli-skiing (addressed in this report under the "air tour" product), and backpacking on the Alexander Mackenzie Heritage Trail both merit a close look.
  - Once the most promising activity or activities are selected, learn which market to target, using published information and working with informed sources, such as sports associations or clubs.
  - Seek out potential entrepreneurs who would have an interest in developing ventures in these adventure activities.
  - Work with entrepreneur(s) to define and develop product(s).
  - Once the market is identified and the product(s) developed, seek opportunities such as print media, trade shows or events, and the internet to highlight not only the product, but the appeal of Bella Coola Valley.
  - Produce a business plan for the venture as a prelude to obtaining financing.
  - Consider collaboration and/or partnering with existing tourism operators in and outside the Mid Coast for marketing and logistical support.

Air Touring

There six air transportation companies that are either based or have operations on the Mid Coast. Three companies are fixed winged and three operate helicopter charters. All of the air tour operators in the Mid Coast depend on a range of clients which includes industrial use, general transportation, emergency use and tourism. The air service sector on the Mid Coast has been described as competitive, and with the recent land use determinations in the Mid Coast it is anticipated that industrial use of air services by the forest sector will decline.

- **Objective:** To develop an air touring strategy and marketing approach to support the growth of air touring opportunities among the existing air transportation companies.

- **Status of Infrastructure:** There are airports at Hagensborg and Bella Bella, and a paved landing strip at Shearwater. Oweekeno has an unpaved, seasonally used land strip. The other communities are accessible by float plane

- **Ancillary services:** Accommodation, services, supplies and fuel are available at Bella Coola and Bella Bella. There is a more limited array of services in the smaller communities of the outer coast, although fuel is generally available at most of them.

- **Development tasks:** The community of Bella Coola might want to consider tasks to support the growth of air touring locally, including the following.

  - Determine the interest among the air transportation companies to become more involved in air touring activities and the overall tourism sector. Heli-skiing merits close consideration.
  - If the air transportation companies are interested, undertake a market assessment of the type of air touring products that would appeal to visitors coming to the Mid Coast.
  - Explore the packaging of air touring products with other local adventure tour activities on the Mid Coast. Helicopter operators should work with heli-skiing proponents to determine this product's feasibility.
  - Develop a marketing strategy or participate with existing tourism marketing efforts locally to raise the profile of local air touring operators and highlight specific air touring activities.

7.4 Regional Strategy

While there are specific tourism opportunities that each community may want to consider developing it is important to be aware that tourism operator face many challenges, including:

- complexity of developing, marketing and operating the product;
- changing customer expectations;
- stiff competition;
- rising costs; and
- a growing need to be a player in the global market.

This points to the need for communities to seek better ways to initiate and help build tourism businesses. Two essential strategies for communities on the remote Mid Coast are collaboration both within and outside the region, and keeping fully informed about the market and the competition.

There are sound reasons for communities and tourism operators to work together, and to seek partnership with each other and with related stakeholders. First, operators do not work in a vacuum. Their businesses are located in an area where there are many overlapping interests and concerns -- by First Nations, other tourism operators, communities, government agencies, industrial operators, and environmental interests. Tourism operators – or communities advocating tourism expansion -- can best represent their collective interests in this context as a group, effectively gaining a voice in the decisions about issues such as future ferry schedule service, regional economic development initiatives, or land use decisions.

By working together, communities and tourism operators on the Mid Coast can market their products under a single image, or "brand". This will enable them to market their products as complementary products, and minimize local or regional in-fighting for market share. A regional marketing image will also reach a larger market. To illustrate this, consider which has more cachet in the international tourism market – citing a specific Mid Coast kayaking or road tour product, or invoking the image of the Great Bear Rainforest?

Finally, by working together, Mid Coast tourism operators can reduce some of their costs, and create new sources for marketing their products. All operators face some similar challenges in starting up and sustaining their businesses. In this section, we have therefore outlined a regional approach that could be adopted by communities to advance tourism growth.

7.4.1 Developing Strategic Partnerships

Communities should explore ways to **collaborate and connect their resources** to share in product development, assist with making regional linkages to support tourism development, and resolve issues that they all face with regards to tourism development.

Explore **relationships with communities** adjacent to the Mid Coast Forest District on Vancouver Island and the North Coast to investigate ways to leverage marketing focus and support each other in complementary product development.

Provincial Partnership[2]

The Ontario Ski Resort Association has developed an operational partnership, which provides members with a joint insurance program for liability and property insurance. The key partners are the OSRA and 50 of its members, an insurance agent and an insurance broker.

Through the formation of this partnership, the industry has developed risk management programs, standardized waiver language and signage at resorts and has reduced members' risk from a litigation point of view.

- Cultivate solid working relationships with all levels of government to create a climate that will attract investment and foster the timely development of tourism products on the Mid Coast. It is proposed that responsibility and resources be defined to **undertake liaison activities** between government agencies and the local tourism and community interests in order to:
    - educate and inform regulatory agencies of tourism development priorities in the region;

---

[2] KPMG Management Consulting (April 1995), *Developing Business Opportunities Through Partnering: A Handbook for Canada's Tourism Industry*. Prepared for Industry Canada – Tourism.

- develop a local understanding of regulatory agencies' requirements, and an understanding of the appropriate processes for new development from the point of municipal, provincial, and federal perspectives; and,
- educate funding agencies as to the activities and priorities of the local tourism sector. This will assist funding agencies with a traditional focus of participation in fishery, forestry and other primary resource-based initiatives to become more comfortable with the process of tourism development. It may also allow them to be more proactive in their participation in community development.

7.4.2 Tourism Business and Product Development

- Support the development of local tourism sector opportunities by establishing a group of **business mentors and regional financial experts** to advise on the issues and requirements of securing financing and business development. Securing financing for entrepreneurs who wish to initiate tourism businesses will be challenging. Many traditional lending institutions do not like to lend to ventures located in remote areas of British Columbia. The local mentors and financial experts could:

    - consider the merits of establishing a local Community Venture Capital Corporation (through the Ministry of Community Development, Cooperatives and Volunteers) which could further increase the access to capital for tourism related businesses;
    - provide contacts and insights for entrepreneurs developing business plans;
    - assist with developing a network of venture capital avenues and alternative financing opportunities for tourism businesses;
    - educate local financial agencies as to the potential and opportunities within the local tourism sector and work towards informing the financial community around issues of perceived and real risks in the tourism sector, and,
    - explore the development of lending circles to support tourism business start-up.

- Work with agencies such as the Bella Coola Community Futures Development Corporation, the Central Coast Regional District, and the Bella Bella Community Development Society to ensure **up-to-date and accessible tourism information** is in place to support local tourism business development. This resource should be available in one place, such as the local economic development or Community Futures office. For example, there are many sources of tourism market data such as research done by the Canadian Tourism Commission. To access this as an individual can be very time consuming. However, by ensuring it is in one place locally and periodically updated, it would enable businesses to get the best data possible for key business decisions.

- Work towards identifying and developing a **code of ethics** for tourism operators involved with the various product areas offered in the region. Provincial standards and standards developed by industry associations in other jurisdictions should provide excellent guidance to these efforts. Locally SuperHost has been offered several times, however, efforts should be considered to make sure the Mid Coast begins to develop high standards and promotes itself as a provincial leader in this area.

Create a Group: Be guided by its Values and Direction[3]

Tours Innu is a native receptive tour operator in Quebec, specializing in ethnocultural tourism, developed by The Societe Touristique Innu. The society is a non-profit organization founded in 1991, and responsible for the development of tourism in several aboriginal nations in Quebec. It aims to offer an authentic quality tourism product during four seasons, focusing on authenticity, nature and culture. This society is actually a membership organization of the native groups, councils and businesses, themselves. They spent several years researching interest in aboriginal product at national and international travel forums before developing Tours Innu.

The society has developed standards for its operators, and all members have to be approved. They have a training program for native personnel, and a strict accreditation system for service providers. These standards provide a guarantee that all trips will involve a certain quality, security and personal respect. They have extensive list of safety and quality criteria.

Standards include: hospitality; environment; aesthetics (inside and outside); noise pollution; emissions standards; non-polluting energy sources; no trace use and camping; water use and grey water disposal; sewage; and infrastructure standards.

- Establish a task force to explore the opportunities and disadvantages for local operators to develop **joint ventures and partnerships** with larger tourism companies from outside the region. Many tourism opportunities require specialized skills, experience with specific market networks and significant capital investment that may not be available within the region. Local resources should be identified to guide exploration of the potential for joint ventures with larger more experienced ventures from outside the region.

- Identify and deliver specific **training** support, including:
    - coordination of needs and service delivery – e.g., if several communities require a certain kind of training (e.g., guiding or kayaking tours), they could jointly arrange to share a training session or course in order to minimize costs;
    - leveraging federal and provincial government resources to undertake training – this will involve staying fully informed about new sources of funds and how they are delivered;
    - supporting local delivery of training, especially in the smaller communities; and
    - implementing activities and projects – e.g. pilot projects, initiating local programs to disseminate and teach cultural interpretation.

Several post-secondary institutions in BC now offer a range of adventure tourism programming. As well, educators at these institutions provide their services locally on a variety of training courses and workshops that range from risk management, ocean kayak training, to interpretation skills and techniques. For example, educators at the University College of the Cariboo are working with individuals in the community of Klemtu on developing ocean kayaking expertise.

---

[3] Pam Wight and Associates (March 1999), *Catalogue of Exemplary Practices in Adventure Travel and Ecotourism*. Prepared for the Canadian Tourism Commission.

Many of the workshops and courses have been developed in cooperation with the various adventure tourism associations in the province. However, these courses are typically offered at full cost recovery and this can deter some individuals and communities from readily accessing such programs in smaller numbers.

7.4.3 Ensuring Effective and Efficient Marketing

- Focus on **regional marketing and explore the development of a regional image** by undertaking group marketing of the unique features of the Mid Coast. Tourism proponents can create an image that will raise the profile of the region to compete with other global destinations that feature wilderness and outdoor experiences. Recent media coverage of the Great Bear Rainforest has already been instrumental in raising global awareness of the intrinsic value of the Mid Coast. This could prove to be a good jumping off point for future regional marketing efforts.

- Explore approaches to coordinating and developing additional resources for marketing efforts. The Mid Coast with its small population base is at a disadvantage when it comes to marketing resources – this means the communities must work together. Resources will be more efficiently and effectively utilized by:

  - leveraging regional marketing funding from funding agencies and surrounding organizations through developing partnerships and strategic alliances to pool resources for the area;
  - ensuring packaging of complementary products – tourism packaging and marketing of tourism packages are closely tied, and assist operators to combine their efforts where they have common goals;
  - liaising with other communities, tourism organizations, and stakeholders to coordinate the targeting of tourism resources at trade shows and other marketing events; and,
  - consistently making an effort to communicate with media outlets, tourism magazines, and major tourism operators, agencies and brokers to increase market exposure for tourism at minimal cost.

- The Mid Coast tourism sector can, and should, use the media, internet and other networks to publicize or announce key events and experiences that make it such a special place. This could include:

  - the 50th anniversary of the completion of The Hill;
  - the herring catch on the outer coast – this could be a feature article in Canadian or international magazines about the harvest of and market for herring roe;
  - special wilderness experiences such as major fish runs, or Grizzly/Kermode Bear viewing experience; or,
  - music festivals, rodeos or artistic/cultural events.

A Vancouver-based film producer is presently working with long-time resident Al Elsey of Anahim Lake to produce a documentary film about the history of The Hill, with the story chronology spanning the history of the first native inhabitants, the trade routes, and the construction of the road, to today. Shooting is expected to begin in the summer of 2002. The broadcasting of the proposed six-part documentary could coincide with the anniversary of The Hill's completion. If broadcast, this documentary could be instrumental in educating more Canadians about the Mid Coast and drawing more attention to the region.

- Establish a visible tourism information centre in Bella Coola, the hub of ferry and vehicle traffic during the summer months. Visitors arrive at Bella Coola after a long trip by ferry or car, often late in the day or early in the morning. Many are unable to find out about the attractions in Bella Coola or elsewhere on the Mid Coast, or are unmotivated to do so on their own. If they can obtain information from an attractive and well-marked visitor information centre, many will be inclined to explore the region more, and *stay longer.*

- Find ways to attract more ferry arrivals. This will include erecting larger signs at the Bella Coola ferry terminal, and ensuring that a hotel is open for early morning arrivals.

- Consider marketing the Mid Coast as an extreme destination. Due to its remoteness, the Mid Coast is still regarded as a well-kept secret in terms of what it has to offer. While many BC and US residents know about driving The Hill and its perils, they know little about what lies at the other end of Highway 20. Tourism proponents on the Mid Coast have a chance to capitalize on this mystery by marketing its remoteness, its dramatic wilderness, and its opportunities for adrenaline experiences. Most adventure products are not, in and of themselves, highly profitable, but they do attract a diverse and interesting market with disposable income. If a small number of adventure tour operators were to become successfully established in a Mid Coast community, they could contribute to the image of the Mid Coast, as an extreme destination for certain types of activities (analogous to Fernie and Rossland for skiing, and Moab, Utah for mountain bikers). This could draw a new and unique market to the Mid Coast, and enhance its cachet in the provincial and international market.

Launch of the Tourism Industry's Most Innovative Website

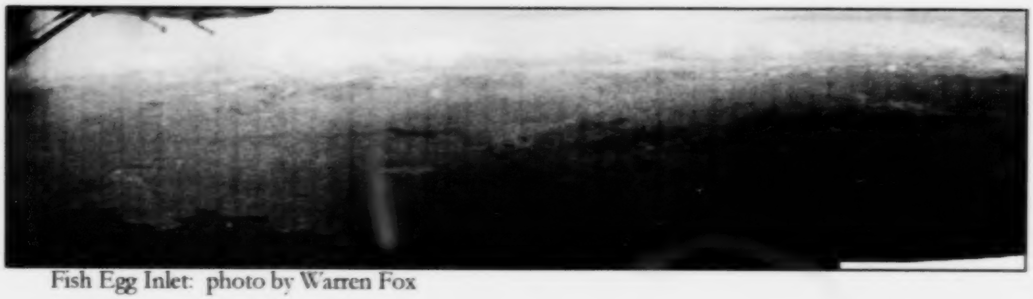
Montréal, March 28, 2001 – Québec Resorts/Hôtellerie Champêtre, a network of 24 inns and hotels located in Quebec, announces the launch of its website www.hotelleriechampetre.com. Designed using creative, leading-edge technology, the site offers visitors a number of options, such as an intranet and an Extranet, interactive information, online booking, the ability to subscribe to an electronic newsletter and monthly contests. This new site is intended for travellers, tour operators, and members from the hotel and inn industry, and provides over 250 individual and group packages for all seasons.

The site is a rapidly expanding network of Quebec's tourism industry members. It has the goal of better reaching its customers, travellers, travel organizers and other associations. As a gateway to more than 24 inns and hotels in Quebec, the QuébecResorts/Hôtellerie Champêtre site offers its online clientele several individual and group packages for each of Quebec's four fabulous seasons, along with exciting online deals.

Each page of information is updated regularly. Visitors to the site can arrange business meetings or conferences online, find information using an interactive approach, secure online bookings, find seasonal specials, or purchase gift certificates for relatives, friends or valued employees. Visitors may also subscribe to an electronic tourism newsletter, access recipes by great chefs, view a road map to better locate the inn or hotel, and peruse media summaries of the services offered by the members of the Québec Resorts/Hôtellerie Champêtre network.

A powerful marketing management tool, thanks to the Intranet portion of the Québec Resorts/Hôtellerie Champêtre website, building customer profiles, customizing offers and continually updating packages, promotions, online deals, electronic newsletters, recipes, contests, news, road maps, media summaries and image databases is as easy as 1-2-3. The immediacy and relevance of the information found on the site make for a powerful marketing management tool and a powerful research tool for anyone wishing to arrange a vacation or a business meeting at one of the 24 inns and hotels belonging to the network.

By using the site's Extranet service, each of the 24 network members can manage and update packages, promotions, online deals, recipes and news, both quickly and independently, without the need for outside help of any kind. The information contained on the Website is constantly updated, making it the most relevant tool for every visitor interested in any of the Québec Resorts/Hôtellerie Champêtre network's hotels and inns.



Fish Egg Inlet: photo by Warren Fox

8 PREFEASIBILITY ASSESSMENTS

8.1 Introduction

During the course of the project, many tourism opportunities have been identified on both the outer and inner Mid Coast. Many of these are promising, but the question is, what needs to be done next? In this section, three opportunities have been selected for further, more detailed evaluation. All three are promising, and garner considerable local support in the respective communities. They are:

- a marine cruise and canopy walk at Roscoe Inlet;
- a road tour of the Bella Coola Valley; and,
- a hut to hut guided ocean kayaking tour near Bella Bella.

The objective is to carry out a pre-feasibility assessment of each opportunity to determine -- in a preliminary fashion – whether a business based on each opportunity could provide to feasible, and whether or not to proceed with a more detailed feasibility assessment or business plan. The prefeasibility phase is also the time to week out any showstoppers.

Pre-feasibility assessments evaluate selected opportunities in a practical and detailed fashion. The objectives are to make a "first cut" at whether or not an opportunity has development potential, and to make recommendations regarding feasibility or whether more detailed analysis is merited. The key criteria in carrying out the assessment are as follows:

- clearly define the opportunity, and the rationale behind its selection;
- provide a brief overview of key market considerations, including a competitive analysis;
- identify what amenities already exist, and what is needed to support the development of this opportunity;
- where possible, estimate order-of-magnitude potential revenues and costs;
- identify possible links with other products that could contribute to feasibility; and,
- identify any key regulatory requirements or other challenges to undertaking the development of the opportunity.

In addition to evaluating the three selected opportunities, the pre-feasibility assessment provides template for undertaking other evaluations.

The rest of this section is devoted to carrying out the three prefeasibility assessments.

8.2 Prefeasibility Assessment of a Marine Cruise and Canopy Walk at Roscoe Inlet

DESCRIPTION

The product is a motorized marine cruise day trip from Bella Bella to attractions at the south end of the Florence Peninsula near Roscoe Inlet. At the first stop, visitors will disembark at a stand of old growth cedar trees and enjoy a short hike and guided nature observation tour on elevated canopy walkways – a series of suspended cable bridges located high in the canopy of the forest. The unique perspective enables visitors to observe a wider range of wildlife and flora on the ground and in the canopy. After experiencing the canopy walk, the passengers will travel by boat to the mouth of Claje Creek for wildlife viewing opportunities, and a short forest hike. On the return trip to Bella Bella, visitors may be taken to view an ancient Heiltsuk village site.

Travel to Roscoe Inlet would be by small, motorized craft, carrying six passengers. Travel time is 1½ hours by boat from Bella Bella to the canopy walk, and another 15 minutes by boat from the canopy walk to the mouth of Claje Creek. This will be a full day trip.

Other features of the tour would include a miniature big house near the canopy walk, interpretation by the guide, lunch, and tea served in the canopy walk teahouse. Overnight stays may be possible at an existing rustic cabin in nearby Troup Passage.

Walkways can be either linear, or a circle route, with a series of lookouts surrounding the support trees. At Kakum National Park, the canopy walk is a circle route over 300 metres in length. For the Mid Coast, the walkway will likely be U-shaped in configuration, consisting of three to four bridges, lookout structures, and a canopy-level teahouse.

The Roscoe Inlet canopy walk tour can be offered as day trip, or be linked to other, longer tours such as a three day pocket cruise trip to the head of Roscoe Inlet or through nearby Johnston Channel. The canopy walk tour will be linked to other local initiatives, such as a proposed new hotel in Bella Bella, and a central reservation centre at McLouglin Bay. By marketing the canopy walk tour on BC Ferries, and selling this and other tourism packages at McLoughlin Bay, the Heiltsuk will maximize their market exposure to Mid Coast visitors, and be able to plan and control visitation.

The Roscoe Inlet canopy walk tour will be owned and operated by the community of Bella Bella through a non-profit organization, the Heiltsuk Community Development Society. The land would be leased from a local woodlot licensee. A small number of local boat owners will sub-contract their services to the Society.

RATIONALE

There are presently six or seven "canopy walks" in the world. A canopy walkway system constructed in Kakum National Park in Ghana, West Africa, has significantly boosted the annual number of visitors to the park, and proven that the opportunity to view a forest from the canopy level is a tremendous draw for eco-tourists. In Kakum National Park, annual attendance at the park has risen from 700 visitors in 1993, to over 60,000 in 1998. Much of this increase is ascribed by park officials to the canopy walkway.

The Mid Coast region is characterized by one of the biggest intact coastal temperate rainforests in North America. There are abundant wildlife viewing opportunities in remote Roscoe Inlet – including eagles, bears and wolves, and seasonal chum and pink salmon migrations. Its outstanding viewscape and inherent qualities would make Roscoe Inlet a highly attractive destination for tourists and recreationists seeking a unique wilderness experience. The prime target markets are BC residents and international travellers willing to pay a premium to travel to the Mid Coast.

The appeal of the canopy walk product is enhanced by combining it with other activities – wildlife viewing at Claje Creek and aboriginal cultural interpretation at an ancient Heiltsuk village site. In addition, it could be linked to other types of tours in the region, such as pocket cruises. Variations may include overnight stays at the cabin at Troup Passage or -- in the longer term -- overnight stays in the canopy in converted teahouse. Tours offered during the fall salmon migration would extend operations into the shoulder season.

The canopy walk product has the potential to create positive net revenues for the local community over a long period of time. As it will be a community-owned and operated venture, almost all income will be realized at the local level. The canopy walk tour will also be instrumental in upgrading local labour force skills. Boat operators will also act as guides, and they will be required to train and obtain certification in cultural interpretation and canopy walk biology. Overall, the product would generate employment in construction, operating, guiding, maintenance and marketing throughout almost half of the year. It is entirely compatible with First Nation values, and community objectives of economic self-reliance.

This product is, in all ways, environmentally sensitive, and contributes to the long term sustainability of the tourism industry on the Mid Coast. One of the greatest merits of a canopy walkway on the Mid Coast is the media attention it would draw to the temperate rainforest in the project area, and to its preservation.

MARKET

The marine cruise and canopy walk at Roscoe Inlet will appeal to eco-tourists from within and outside BC. The experience in Ghana has shown that approximately 60 percent of visitors to the park are Ghanian, while the other 40 percent are from outside the country. The dramatic growth in visits to Kakum National Park over a five year period demonstrates that there is strong demand for a product that combines wildlife viewing with a unique, tree-top experience.

The two key markets for this product are:

- travellers and vacationers already planning to or taking a trip to the Mid Coast, who would include the canopy walk as one of their holiday activities; and,
- provincial and international ecotourists (from BC and outside the province) interested in wildlife observation and/or aboriginal culture, and who would make this a destination.

The Mid Coast is served by air, road, boat and ferry modes of transportation throughout the year, with particularly high volumes between July and September. This means that there is a critical mass of visitors who pass through the region during the summer months. The number of travellers to the Bella Bella/Shearwater area is estimated as follows.

Ferry traffic: BC Ferries' data shows that just over 6,600 visitors travelled by ferry to or from the Mid Coast in the summer of 2000, and that this number is relatively steady on a year to year basis. Of this, approximately 252 vehicles and 1,079 passengers arrived in Bella Bella and Shearwater in the summer of 2000. According to BC Ferries, travellers on the Discovery Coast Passage tend to be a younger market, primarily on vacation.

Air: In 1999/2000, there were 3,512 landings at the Bella Bella airport, up 200 from the previous year. Throughout the winter months, there is one scheduled flight to and from Bella Bella per day, however this increases to two flights in August and September. Based on the average capacity of the two planes flying during the summer months, and information provided by airport staff,[1] it is estimated that over 1,600 visitors travel to Bella Bella during the summer months for recreational purposes, largely sports fishing. This pertains to Pacific Coastal Airlines only. Charter companies from Vancouver, such as North Vancouver Air, generally serve forest companies and other corporate clients, although they may occasionally carry tourists.

Marine vessels: Reliable information concerning the number of privately owned craft travelling to and from the Mid Coast is scarce. The operator of the Shearwater Marina indicates that, during the summer months, they have at least 300 overnight stays – there are also many more, uncounted day visitors. In Bella Coola, about 40 to 50 boats tie up per season. No information is available for Ocean Falls, but given its location at the end of an inlet, we estimate that the numbers are on a par with those of Bella Coola. Overall, it is estimated that there are at least 400 overnight visitors annually at the principle marinas of the Mid Coast.

Altogether, it is estimated that the available market for a canopy walk tour in the Bella Bella/Shearwater area is at least 3,100 per year.[2] Based on the experience of a tourism operator in Bella Bella, it is reasonable to expect that, in the short to medium term, ten to fifteen percent of this market could be captured. This translates to an initial demand of at least 310 to 465.

It should be noted that many other visitors arrive annually on the Mid Coast by air, tour bus, car and boat. This includes a growing number of bus tours, elder hostels and other package tours, however it is difficult to quantify. As awareness of the canopy tour grows, it is likely that a significant proportion of these visitors could be enticed to add a visit to Bella Bella and the canopy tour to their travel plans.

---

[1] Most passengers on evening flights are travelling to the Mid Coast for sportsfishing and other recreational activity; there is generally a mix during the daytime.

The foregoing discusses market potential in the numbers that already visit Bella Bella and the Mid Coast. However, there is also large, untapped potential in the global ecotourism market. The remote location of Roscoe Inlet poses a challenge of access, but it also contributes to the product's exotic image, especially to international travellers. As the canopy walk in Ghana has shown, there is a segment of the eco-tourism market that is willing to pay a premium, and travel a long distance, to learn from and enjoy a phenomenal new wilderness experience. As discussed in Section 4, Canada's share of the growing world eco-tourism market has tremendous potential to grow, and the Mid Coast will also benefit if it has the products and amenities required to attract and impress visitors. The demand potential for a canopy walk product is large, and in the long term limited only by marketing and infrastructure (such as accommodation) to support the product. To enhance its marketability, the canopy walk tour and local (or tree house) accommodation would need to be sold to long haul visitors as a package.

To summarize, the canopy walk will appeal to both holiday through-traffic on the Mid Coast and, in the longer term, the long haul eco-tourism traveller market. When targeting these two separate markets, the operator needs to be aware of the distinctly different preferences and circumstances of each.

COMPETITION

There are presently six or seven canopy walkways in the world today. Two of the most successful canopy walkways are thought to be the Kakum National Park Canopy Walkway in Ghana (winner of the 1999 Condé Nast Eco-tourism destination of the year award), and Eco-Parque de Una, Brazil. It is our understanding that there are also walkways in China and Malaysia, with varying degrees of success.

The only canopy walk in Canada is located in the Haliburton Forest and Wildlife Reserve in Ontario. It is a series of 17 bridges situated in a pine forest, with a view of a lake.

Some BC-based proponents who were involved in building the Ghana canopy walk are currently in the early process of initiating a canopy walkway on Vancouver Island.

ACCESSIBILITY AND INFRASTRUCTURE REQUIREMENTS

The marine cruise component of the Roscoe Inlet canopy walk tour is a 1½ hour motorized boat trip from Bella Bella to the landing at Roscoe Inlet. At the staging area – Bella Bella -- there are several small boats available that are suitable for this purpose. There is presently no wharf at Roscoe Inlet, but there is a rustic cabin used periodically by the Heiltsuk people for camping and fishing. At the landing points for the Claje Creek walking tour and the Heiltsuk village, there is no shoreline infrastructure. The key infrastructure required for this project is as follows.

---

[2] Note that this is conservative.

Marine cruise component:

- mooring buoys to be located at landing point near canopy walk
- pulley system to allow boat operators to pull boats onto or off of the beach
- in the longer term, larger boats with the capacity for 20 passengers – for example, de-licensed salmon seine boats -- could be used

Ground level at canopy walk site:

- trail from landing point to bluff near the canopy trees
- system of hiking trails for viewing at ground level
- miniature big house
- interpretative signs
- composting toilets

Canopy level:

- access cable bridge connecting top of bluff with canopy walk system
- series of cable bridges connecting the various trees – constructed of steel cable, ropes, and netting for safety (it is assumed that there would be 3 to 4 of these bridges)
- wooden viewing platform at each key tree
- tea house

Claje Creek:

- system of hiking trails
- composting toilets
- possible interpretive signs

Heiltsuk village site:

- dedicated trails
- interpretive signs

CONSTRUCTION COSTS

The primary tasks in developing this product will be to:

- design and obtain engineer approval for cable bridges for canopy walk;
- construct the cable bridges at the canopy level, and the bridge providing access from the ground;

- prepare the infrastructure for boat access;
- locate and ground truth the trail network;
- prepare the trail bed in accordance with Ministry of Forests and BC parks technical standards; and,
- design and construct any structures (toilets, big house, lookouts, tea house at canopy level).

The canopy walk would be located on a Ministry of Forests wood lot. While there is no cost of land acquisition, annual lease fees would be payable to the wood lot licensee.

Wherever possible, local materials will be used in the construction, and this may require the use of an on-site sawmill. Specialty materials such as steel cable and heavy ropes would be transported to the construction site via boat or barge.

All construction would be carried out by local workers. It is estimated that six workers would be required to carry out construction on the canopy walk full time for approximately 3 months. Some additional workers would be required during this time for building shoreline infrastructure and the trail system.

Once constructed and operational, the Roscoe Inlet canopy walk tour would create seasonal employment in maintenance and operation, guiding and interpretation, boat operation, guide training and marketing. It would also generate more employment in the local accommodation and service sector.

Order of magnitude costs for construction of the canopy walk are as follows.

Table 8.2-1
Capital Costs for Construction of Roscoe Inlet Canopy Walk Infrastructure

canopy bridges: 4 bridges @ \$30,000C[3] each	\$120,000
big house & tea house \$20,000C each	\$40,000
moorage facilities	\$2,500
trails under canopy walk & at Claje Creek (400 metres @ \$50,000/km)	\$20,000
Sub-total	**\$182,500**

Clearly, more precise information will be required to assess construction costs at the feasibility or business plan stage.

OPERATING COSTS AND REVENUES

In the first years of operation, it is assumed that the local fleet of small boats in the Bella Bella area would be used to transport visitors to the canopy walk. Generally, these boats have a capacity of 6 passengers. In the longer term, when demand for the canopy walk swells and the venture is more profitable, larger boats (e.g., de-licensed salmon seine boats that could be fitted to have a capacity of 20 passengers) could be leased or purchased. In this analysis, we have estimated a range of operating costs for the first years of operation, based on the assumption of small six-passenger boats only. Other assumptions are as follows.

---

[3] includes labour and capital – based on previous experience in Ghana

Ownership structure

- The operation would be owned and operated by the Heiltsuk Community Development Society, a non-profit organization. A small number of local boat owners would lease their vessels or sub-contract them to the Society, and would be responsible for paying their own insurance, maintenance, etc. This would be covered by the fee for day trips.

Revenues

- A range of revenues for the first years of operation has been estimated, reflecting either a 10 percent market share of visitors to the project area, or a 15 percent share.
- The trips are one day in duration.
- The tour would operate up to 5 months per year.
- Passengers would pay $110 each for a guided tour, using the local fleet. Owners of private craft would pay $30 each. These rates would allow operators to cover their basic operating costs, and earn a small working capital for the Society. They are also comparable with the rates charged in Ghana ($25US for foreign visitors in 1998).

Costs

- Boat operators would charge $300 per day to cover labour, gasoline, insurance, maintenance and depreciation costs.
- Annual insurance for the canopy walk attraction could cost approximately $4,000.[4] As the number of visitors increases, so will the potential risk and the corresponding insurance premium.
- Leasing fees would be approximately $2,000 per year.
- Tickets sales would take place primarily at the proposed reservation centre at McLoughlin Bay. A small proportion of the operating costs of the centre are ascribed to the canopy walk tour.
- The cost of lunch per passenger is estimated to be $10.

---

[4] Ballpark estimate provided by a Vancouver insurance agency. As there are few precedents of canopy walks in the world, an insurer would require considerable information on risk, etc. before providing a specific rate.

Table 8.2-2
Operating Costs for Roscoe Inlet Canopy Walk Tour

	10% Market Share	15% Market Share
Annual Revenue		
Guided boat tours	$31,509	$47,146
Fees from private craft	$1,273	$1,910
Sub-total	**$32,782**	**$49,056**
Annual Costs		
Guided boat tours	$14,322	$21,430
Lunches/snacks @ $10/passenger	$2,864	$4,286
Maintenance 1 time per week	$1,300	$1,300
Insurance - canopy walk	$3,500	$3,500
Wood Lot Lease Fees	$2,000	$2,000
Marketing & ticket sales	$1,664	$1,664
Sub-total	**$25,651**	**$34,180**
Net revenues	**$7,131**	**$14,876**

Assuming that the boats are generally at full capacity, gross revenues per year could range between $32,000 and $49,000 per year. . Total operating costs would range between $25,000 and $35,000 per year. Net revenues would therefore range between $7,000 and $15,000 in the first years of operation.

The foregoing analysis is based on very preliminary cost estimates and conservative forecasts regarding market potential. With effective marketing and a record of success, the canopy walk tour could generate significant demand growth, with subsequent increases in profitability.

LINKS TO OTHER PRODUCTS

As the Roscoe Inlet canopy walk tour becomes well established, it can be linked to other local tourism products in order to enhance the draw. Some possibilities are:

- overnight stay at nearby cabin or, in longer term, canopy-level teahouse that has been converted to a treehouse;
- 2 or 3-day pocket marine cruises in Johnson and Roscoe Inlets;
- kayaking expeditions, possibly with a mothership; or,
- as a supplemental activity for visitors to Mid Coast sports fishing lodges.

This will require the proponent to forge working relationships with other tourism product operators – locally, provincially and in the US.

REGULATORY REQUIREMENTS

The project proponent will need to satisfy the following regulatory requirements (note that this list is not intended to be comprehensive):

- engineer's approval of canopy walkway structure,
- obtain liability insurance for canopy walkway -- there are approximately 6 insurance companies in Canada that might consider undertaking this,
- Transport Canada's approval of vessel standards,
- obtain Ministry of Forests approval for non-timber use of wood lot,
- undertake possible environmental and archaeological impact assessment.

RECOMMENDATIONS

The findings of this analysis appear to confirm that a canopy walk tour at Roscoe Inlet would generate modest but positive net revenues during the early years of operation. Given the nature of the product, it is also clearly sustainable over a long period of time. As demand grows and visits to the Mid Coast increase, the Roscoe Inlet canopy walk tour will make a significant contribution to local economic self-sufficiency. We recommend that long term cash flow be evaluated in the next stage – feasibility assessment and business plan -- as a prelude to seeking funding for the project.

The key recommendations are as follows.

- Determine if the Heiltsuk community supports the concept.
- Identify local entrepreneurs or business operators in the community that would want to pursue the development of the specific adventure tourism product.
- Become informed about the required training for local guides (e.g., cultural interpretation or canopy walk biology), and the most cost-effective way to deliver it.
- Obtain more precise information on specific cost items, such as liability insurance.
- Undertake a detailed business plan to outline the viability of the opportunity and secure financing if necessary.
- Establish partnerships with other tourism operations, such as fishing lodges, as a way of broadening the market and seeking gains from trade.
- Suggestions for marketing include the following:
    - website, with link to BC Ferries' website;
    - advertising on BC Ferries vessels;
    - advertising in selected tourism trade journals;
    - brochures in Mid Coast, Williams Lake and North Vancouver Island hotels and Visitor Information centres;

- press releases to environmental organizations – e.g., Alton Jones Foundation and other US-based organizations -- Canadian Tourism Association, World Tourism Organization;
- BC, Canadian and international media blitz[5];
- contact with other, key tourism operators on the Mid Coast;
- contact with agents and brokers (e.g., Super Natural Adventures in Vancouver).

---

[5] Canopy walk in Kakum National Park was featured in an edition of National Geographic (check with John)

8.3 Prefeasibility Asssessment of A Road Tour in the Bella Coola Valley

DESCRIPTION

This product is a road tour of the Bella Coola Valley, with the option of including "the Hill" portion of Highway 20. It would be a small, "personalized" tour with no more than six guests, using a minivan. While there are a number of routes possible, it is generally assumed that the tour would begin and end in Bella Coola, and travel to a number of attractions throughout the Valley and possibly "the Hill" on Highway 20.

The road tour would be offered during the summer months, on the days that the ferry arrives in or departs from Bella Coola. It would be of four to six hours duration, and include a snack or light lunch at a local lodge or bed and breakfast establishment (or at a picnic site, if the weather is favourable) as part of the package. The operator could offer a variety of tours, such as the following:

- Extreme Bella Coola (six hours) -- Starting in the morning, the tour would go through the Bella Coola Valley with at least one stop to view eagles and wildlife (e.g., Klonnick Creek); drive up the Hill to the viewpoint at the eastern boundary of Tweedsmuir Park to see Rainbow Mountains; lunch on the return trip; short hike along Bella Coola River; return to Bella Coola.

- Historical Bella Coola Valley (four hours) -- Tour begins with a visit to the museum (45 minutes), then a walking tour of the town (one hour); leisurely drive up the Bella Coola Valley with stops to view various historical or cultural sites; lunch or snack; return to Bella Coola

- First Nations Tour (four hours) -- This would require the involvement of the Nuxalk First Nations, and the services of a Nuxalk guide. The tour could originate in Bella Coola in the afternoon, with stops at the Thorsen Creek Petroglyphs, the culturally modified tree at Walker Island, other key Nuxalk cultural sites (possibly including the proposed new administrative centre), and the band school at Four Mile Subdivision. All interpretation would be by a Nuxalk guide. The tour could culminate at a display of native food and art in the Nuxalk Village or band school; return to Bella Coola. Guests could purchase art or salmon dinner (if available).

- Bella Coola Valley by Air (four hours) – Originating in Bella Coola, this would be a road-air circle tour. It should be offered in the morning, when the air is most calm for flying. One group of passengers would travel to Anahim Lake by road early in the day. A second group of passengers (no more than five) would fly later in the morning from Bella Coola to Anahim, and take a mini van back. The first group that had arrived by van would fly to Bella Coola.

The first three tours are likely more feasible in the short term. The road/air tour holds considerable potential, but should be regarded as a future consideration. As it is the most costly of the tours, it would need to be marketed more extensively, and pre-booked if possible, as it could only be profitable if the plane and van were at full capacity. Weather and flying conditions would also govern whether this tour could proceed on any given day.

The road tours could be offered as half day trips, or linked to other tourism products such as river rafting or drifting on the Bella Coola River, short boat tours, or air tours of the Monarch Glacier, Hunlen Falls, the Rainbow Range, and other local sites. This would enable the operator to utilize the vehicle on a year round basis.

The operator could also offer other, customized tours on the request of visitors. In addition, the operator could provide hospitality services or shuttle/transportation services throughout the Bella Coola Valley.

RATIONALE

While several conventional bus tours travel through the Bella Coola Valley every summer, these tours are generally offered as part of a much longer route (e.g., circle routes out of Vancouver, Victoria, and the US). Presently, there is no local road tour offered to those travelling independently to the Bella Coola Valley. Moreover, there is no taxi or bus service in the Bella Coola Valley, and independent visitors are generally required to learn about the historic and cultural and sites of the area on their own.

What this points to is the need for a service that transports visitors to the many attractions and interesting sites of the Bella Coola Valley, and provides the information and interpretation that will enhance the visit.

A road tour product, in and of itself, is likely to be modestly profitable. However, a well-run road tour could also generate broader economic benefits in a number of ways.

- By informing and entertaining visitors to the Bella Coola Valley, a road tour product would educate a broad audience about the history and attractions of the area, and stimulate greater interest in BC and abroad. The Bella Coola Valley is a "well kept secret" that needs to be told to the world.
- It could be marketed to provide links with other tourism products such as air tours, river drifts, marine tours, short hikes or First Nation culture, thereby spinning off benefits to other operators and to the regional economy.
- In the longer term, it could stimulate demand for more road and marine tours, and other activities.

A road tour product in the Bella Coola Valley could serve as a central contact point between visitors and the many features and products available to them. It could also be an integral component of a marketing campaign that sells the Valley as a region.

MARKET

As discussed in Section 6.6, touring comprises a major component of the North American tourism market, and it is expected to grow. Touring is a broad category, however, that encompasses many niches, ranging from conventional 47-seat bus tours to small, more active experiences with no more than 6 passengers. A review of the bus tours offered on the Internet reveals the diversity of what is available in BC. Tours can be short (1/2 day) or multi-day including overnight accommodation in a series of hotels; activities range from sightseeing on a luxurious coach, to transporting and accommodating backpackers.[6] The one characteristic of road tours that unites all travellers is the desire to learn and understand more about the places they are visiting.

In terms of demographics, the road tour market can generally be split into two categories:

- mature market, ages 55 to 74 – generally prefer comfort, and less strenuous activities; and,
- younger market, under age 55 – likely seeking a more active experience.

The latter group is most likely to be attracted to a small road tour, particularly if it can be customized to their interests. While the tour market is growing overall, the small, customized tours appears to be particularly promising.

When structuring a road tour, the operator needs to consider what market s/he is trying to reach. In our view, tours of the Bella Coola Valley or First Nations heritage/culture would be appealing to both mature and younger visitors. Tours, however, that involve hikes (say, to the Thorsen Creek petroglyphs) or links with river drifts or marine cruises are likely to attract younger clientele. Therefore it will be important to plan and customize to the needs of the clients.

It is estimated that approximately 8,500 visitors travel to and from the Bella Coola Valley every summer by ferry/car. Because there is no tourism information centre, visitors generally must seek out activities and interesting sites on their own. Those not motivated to do so are inclined to visit Bella Coola briefly, shop a little, and then depart to Williams Lake or on the ferry.

A local tourism operator indicates that visitors travelling from Williams Lake are more inclined to stay in Bella Coola and seek out things to do, while those disembarking from the ferry are a harder market to capture. A well-marketed road tour could disseminate new information to new visitors, and keep them longer. It is not unreasonable to expect that a good tour operation could capture at least two percent of this market in the first years, and more in the longer term.

BC Ferries indicates that, compared to their other routes, Route 40 appears to draw a younger crowd. (Note that if the proposed change to the ferry service replaces the Queen of Chilliwack with a vessel that has cabins, this could change in the longer term.) Many of these travellers want to know more about the history and interesting sites of the Bella Coola Valley. A short tour of approximately four hours that involves interpretation, some walking and several viewpoints would fill this need, and provide visitors with an interesting and enjoyable experience in a beautiful setting.

---

[6] Selected websites include: www.cityscape.bc.ca, www.vancouversightseeing.com/summer_tour3.html. A word search for "bus tours" on the Internet yields many more websites through BC and North America.

ACCESSIBILITY AND INFRASTRUCTURE REQUIREMENTS

It is recommended that the tour operator start the business with an air-conditioned, 7-seat minivan. Over time, the operations could expand to include more minivans, or even larger buses. Other necessary infrastructure for road tours may include:

- bathrooms at selected viewpoints;
- possible turnaround(s) on the Hill; and,
- interpretative signage at important viewpoints, such as the Hill stop at the eastern border of Tweedsmuir Park.

If light or bag lunches are served as part of the tour, these could be taken at a picnic site, or at a local lodge or bed & breakfast establishment.

REGULATORY REQUIREMENTS

A road tour on Highway 20 through Tweedsmuir Park would require a park use permit if it goes off-road into the park. This costs $107 per year, and the operator would need to submit an application to BC Parks. However, if the tour is on paved road only, and just using viewpoints, there are no fees.

CONSTRUCTION AND START-UP COSTS

Infrastructure

The purchase price of a minivan is variable, depending on whether it is new or used. A new minivan will likely range in price from $25,000 to $45,000. Leasing is another option, and it requires a much smaller initial capital outlay. Again, this varies by the vehicle and how much down payment is made. A typical arrangement for a Pontiac minivan is $268 per month for 48 months, with $4,600 downpayment. The lease payments for a Dodge Caravan or 4 wheel drive SUV are higher.

Other possible costs related to the start up of a road tour include the following.[7]

- *Outhouses:* Low end is $12,000 to $15,000 including the cost of pumpout vault tank, if digging conditions are favourable. If conditions are difficult or rock excavation is required, the cost of an outhouse is at least $18,000.

- *Signs:* Will vary according to size, materials, colours, etc. Small interpretative signs (2' X 3' in size) can cost as much as $5,000 to $10,000 – this includes the cost of conceptual design, materials, graphics. Small road signs (4' X 8', aluminum, 2-colour) may cost $500 to $600 each, excluding the cost of posts. The operator will find it more cost effective to provide its clients with handouts, however it may be possible to obtain provincial government funding for signage in the longer term.

---

[7] Unit costs provided by a GVRD park planner, March 2001.

Marketing

A new road tour venture will need to begin marketing seven to eight months in advance of its first trip dates. In the early days of the new venture considerable effort needs to be directed towards marketing with the objective of building up a critical mass of clientele before the start of the season. While there are several sound approaches to establishing a client base, the initial marketing expenditures will be critical. The new venture will need to overcome three market challenges, specifically:

- establishing visibility;
- reaching the target market; and
- establishing sales contacts.

Approximately $10,000 would be needed to effectively market in the first year to start to develop the visibility of the new venture. This would cover the cost of market research, creating industry contacts, print and website advertising and distribution, and travel to trade shows.

Administrative Expenses

Start-up administration costs will include (but not necessarily be limited to):

- legal;
- start-up administrative supply purchase; and
- possible permit application and purchase.

OPERATING COSTS AND REVENUES

Costs

The key operating costs associated with operating a small road tour product are as follows.

Staffing – It is assumed that the tour operator would drive the minivan, however, it would be necessary to hire First Nations guides for any tours of Nuxalk cultural/historical sites such as the Thorsen Creek Petroglyphs. Assuming an hourly wage of $10, the labour cost of each First Nation tour would be approximately $40. So if two First Nations tours are offered per week for 14 weeks, associated labour costs would be at least $1,100. This does not include payments by the employer to WCB, CPP, UIC, etc. Generally speaking, labour is the largest cost item in most types of tourism ventures.

Leasing payments (if vehicle not purchased) – This varies with the type of vehicle and downpayment. Minimum lease payments are likely to be $3,000 per year.

Vehicle and liability insurance – This can range from $2,000 and higher.

Fuel and maintenance -- This will vary with the number of trips made per season, and the condition of the vehicle. If the average trip is 150 km, and the tour is at full capacity (i.e., five trips per week, for 14 weeks) it is estimated that fuel and oil would cost about $1,200.

Annual permits -- $107 per year for provincial park use permit, if tour goes off-road.

Meals – If a light meal is included as part of the tour, the average cost per person is estimated to be $8. With a 2.5 percent market share, this would be approximately $1,700 per season; at 5 percent market share (full capacity), meal costs would be $3,400 per season.

POTENTIAL REVENUES

A range of potential annual gross revenues has been estimated, based on different assumptions about market share. For the first years, at least, a five percent share of the ferry market is an optimistic goal. Approximately 8,500 passengers are transported to/from the Mid Coast every season – five percent of this is 425 passengers. This is approximately the number of clients that would be served if the road tour operates once per day, five days per week, for 14 weeks.

A more conservative estimate for the start up years is a 2.5 percent market share, or 210 passengers per season. This means that the minivan would generally be at less than full capacity, or that the service would be offered less than five days per week.

It is assumed that each passenger would pay $50 for a half day tour, a rate comparable with small road tours elsewhere in BC.

Table 8.3-1: Potential Revenue from Road Tour Product

2.5 percent market share (210 passengers per season)	$10,500
5 percent market share (425 passengers per season)	$21,000

The foregoing gross revenue estimates exclude the following:

- revenue from other services, including customized tours, hospitality services, or general transportation; and,
- any benefits realized from linkages to other products (e.g., air tours, river drifts, marine cruises), or secondary benefits to the local service/retail sector.

RECOMMENDATIONS

While further work is required to evaluate the viability of a road tour product in the Bella Coola Valley, the results show that in the first years, modest profitability can be expected. In the longer term, as the operations expand and certain economies of scale are achieved, profitability would likely improve. We recommend that, if someone chooses to undertake this initiative, they carry out a more detailed feasibility assessment and business plan in order to achieve funding.

Other recommendations for an entrepreneur considering the development of a road tour product are as follows.

- Work with the various interests of the Bella Coola Valley to plan and prepare road tours. This includes the following.
  - Confer with Bella Coola Museum about developing a walking tour of the community.
  - Seek opportunities to elicit the interest and involvement of the Nuxalk people, particularly for the First Nations tours. It is our understanding that some of the Nuxalk already provide interpretive and guide services.
  - Learn from locals, the Tweedsmuir Lodge and BC Parks about short hikes on the route – distance, safety, carrying capacity.
  - If viewpoints or road turnarounds are required, or bathroom facilities near viewpoints, confer with the Ministry of Transportation and Highways or with BC Parks on how this can be expedited, and at what to cost to whom.

- Establish partnerships with other tourism operations in the Bella Coola Valley – e.g.,
  - Tweedsmuir Lodge and other river operators, air tour operators such as Bella Coola Air to establish product linkages;
  - BC Ferries, hotel/lodge operators throughout the Mid Coast to establish outlets for brochures, advertising, and to disseminate information about the tour.

- Assess whether training is required for local guides and, if so, arrange to provide it. Sources of training include the Nuxalk Nation, regional colleges and other tourism operators. Information on history and wildlife can also be obtained by knowledgeable locals.[8]

- Obtain more information on specific cost items, such as liability insurance.

- Begin marketing the road tour product well in advance, at least seven to eight months before the beginning of the next summer season. The objective is to build up reservations as much as possible before the season commences, thereby ensuring a basis of revenue.

- Enlist a range of marketing strategies, including:
  - creating a website, with link to BC Ferries' website for the Discovery Coast Passage service;

---

[8] An example is Al Elsey, former guide outfitter in North Tweedsmuir and Dean Channel. His videotapes are frequently shown on the Queen of Chilliwack, and he is now making a documentary film with Capilano College.

- advertising on BC Ferries' vessels;
- preparing brochures for distribution on ferries, hotels, Visitor Information Centres, and airports;
- disseminating information to travel agents and brokers;
- attendance at trade shows.

The year 2003 is the 50th anniversary of The Hill. This important event should be incorporated into the marketing strategy for a road tour product.

- Work with the appropriate provincial government ministries (Ministry of Transportation and Highways) to obtain funding for highway signage that commemorates the 50th anniversary of the completion of The Hill.

The foregoing list of recommendations is by no means comprehensive, but is intended to give new entrepreneurs some idea of the next steps for implementation. In our view, the road tour product is a promising opportunity, and we encourage locals to actively pursue it.

8.4 Prefeasibility Assessment of Hut to Hut Ocean Kayaking Tour Around Bella Bella

DESCRIPTION

The Heiltsuk hut-to-hut touring product would utilize some of the existing huts that have been built through a partnership of Heiltsuk organizations lead by the Heiltsuk social development department in Bella Bella. There are currently a series of huts that have all been constructed in the last three years. These huts are used for a variety of purposes by the Heiltsuk including healing camps, youth programs, and for local family outings. These activities take place primarily in the summer months. In the winter months, local commercial clam diggers and kelp collectors also use the huts.

The huts are rustic in nature; they typically have six bunks each, and are simply furnished with tables and chairs. Each hut also has a wood stove. The cabins are set back in the forest but have windows that face out towards the ocean with nice views of the surroundings.

From the adventure tourism perspective, the huts could be used to support two different wilderness experiences in two rather distinct geoclimatic zones. The first hut-to-hut tour would be known as the **Inland Fiord tour** and would focus on a route to Roscoe Inlet and area. This tour would have a one way distance of approximately 45 kilometres. The Fiordland tour would highlight exceptional nature viewing activities including:

- large coastal first growth trees;
- salmon spawning areas;
- large land mammals (including bears); and
- a variety of marine birds.

The second hut-to-hut tour would be known as the **Outer Beaches tour**, and would focus on the outer beaches in the Dufferin Island area. Dufferin Island is approximately 20 kilometres from Waglisla and the total tour around the islands would be approximately 100 kilometres. This series of huts would offer a mixture of Heiltsuk culture and wildlife viewing opportunities including:

- the inter-tidal area of the BC west coast;
- untouched west coast beaches;
- an old Heiltsuk village site;
- fishing weirs and pictographs;
- a variety of bird life;
- sea lion rookery; and
- a variety of marine wildlife including whales.

For the summer of 2001 the ferry to Waglisla arrives either early in the morning or late at night. For the late night arrivals the tour group would overnight in Waglisla and begin its tour the following day. For the early morning arrivals they could begin their tour later on the arrival day. Both tours would begin with an orientation session at the traditional big house that will soon be constructed at McLoughlin Bay. During this orientation the tour group will also be given an introduction to the Heiltsuk culture. These orientation sessions will occur early on the morning of the first day of the tour.

Once the orientation is done, the tour group would have lunch and then begin its hut-to-hut adventure, departing for either the west coast **Outer Beach tour**, or the **Inland Fiord tour**. Each route could accommodate a group of between four and six on any one trip. This would be from the point of view of the capacity of the cabins and also from the prospective of maintaining the remote experience that would be promoted.

For the **Inland Fiord tour** the possible route could include a four or five day trip that would feature the following itinerary.

- The tour group would depart on the first day after the orientation and paddle by either ocean canoe or sea kayak for approximately four to six hours to a hut located on the inside of True Pass.
- The second day would see the tour group undertake an approximate six hour paddle to the second hut located at the entrance to Roscoe Inlet in Shack Bay. This leg of the journey would offer many opportunities to view pictographs, habour seals and other coastal wildlife along the way.
- Day three would be spent exploring the Roscoe Inlet area. There are rapids in the area and other significant wilderness features that could be visited. There is also a high likelihood of spotting bears and other large woodland wildlife during the day. The group would spend a second night at the Shack Bay cabin or at a second cabin located in close proximity.
- On day four the group could begin a one or two day return trip to Waglisla with two route options possible:
    - the first route could include following Roscoe Inlet over to Return Channel and head southwest along Chatfield Island before heading south across Seaforth Channel and back to Waglisla; or
    - straight south along Johnson Channel, following the eastern side of Cunningham Island. At the end of Cunningham Island, the group would head west between Cunningham Island and Denny Island through Fisher Channel, back to Waglisla.

At this point the tour would be complete and the touring group would either depart for home or could have the option of participating in the **Outer Beach** tour route. The **Outer Beach tour** would be a day or two longer than the Inland Fiord tour and could include the following itinerary.

- Day one (after orientation) would be a two or three hour paddle northwest up Seaforth Channel from Waglisla to Strum Bay. Strum Bay is a sheltered bay and the site of an old Heltisulk village site. The area also has a nice camping area and the first night would be spent in tents.
- On day two the tour group would paddle to the mouth of Gayle Passage and spend the night in a cabin located in this area.
- Departing from the cabin at the mouth of Gayle Passage the tour group would move leisurely down the pass between Athonlone Island and Dufferin Island on day three. During this trip there would be several

stops along the numerous sandy beaches in the area. The group would then set up base camp at a cabin located in Thompson Bay on Kwunoot Island.

- For days four and five the cabin at Thompson Bay would serve as base camp. For the next two days the group could explore the extensive intertidal life and marine wildlife in the area including seals, sea otters, and the occasional whale. Day trips could be made to the McMillian Group and Goose Island.
- On day six the group would begin heading back towards Waglisla following the narrow passage between Dufferin Island and Horsfall Island and then heading down Seaforth Channel to Waglisla. The paddle home would be one or two days making the Outer Beach route a six or seven day excursion.

RATIONALE

The Heiltsuk marine hut-to-hut venture would combine Heiltsuk cultural activities with marine wilderness viewing into a unique experience currently not offered on the coast. This type of adventure product would focus on the participants in the ocean-kayaking sector.

The Heiltsuk hut system would allow the visitor to explore one of the largest intact coastal temperate rainforests in the world. There is abundant wildlife viewing opportunities in remote Roscoe Inlet – including eagles, bears and wolves, and seasonal chum and pink salmon migrations. Both the Outer Islands route near Waglisa and the Inland Fiord route to Roscoe Inlet offer outstanding viewscape and inherent qualities that would make these areas attractive destinations for tourists seeking a remote and unique wilderness experience. The prime target markets are BC residents and international travelers willing to pay a premium to undertake a remote ocean kayak venture on the Mid Coast.

The hut-to-hut marine-touring product has the potential to create positive net revenues for the local community of Waglisa for a long period of time. While the actual hut system would generate a small amount of revenue, it will be an important component in diversifying the local adventure tourism products in the community could eventually offer. Through local development of the venture, almost all income generated will be realized in the community. Currently the Heiltsuk have a network of huts in place in the Bella Bella area and the hut infrastructure would not be a barrier. These huts are strategically placed so that a comfortable kayaking experience could be developed between huts. Overall, the product would generate employment in guiding, maintenance and marketing for approximately four or five months of the year. It could be developed in a manner that would be compatible with the Heiltsuk values, and community objectives of economic self-reliance.

As well, the hut-to-hut system would likely lessen the human footprint left on the land and would ensure the environment is respected, thus contributing to the long term sustainability of the tourism industry on the Mid Coast.

COMMUNITY PARTICIPATION

The Heiltsuk hut system has been developed and is operated through the participation and cooperation of several groups in the community. These groups have participated in the fund raising efforts and have contributed volunteer labour to the building of the huts. The community also provides on-going maintenance for the up keep as well.

The Heiltsuk social development department and other community groups schedule numerous activities for the huts throughout the year. The summer months are the most active time for the hut useage. Therefore, the use of the huts for adventure tourism purposes would have to be closely coordinated with the community groups. Overall, the adventure touring use of the huts will be confined to specific periods that would fit with the community's overall use of the huts.

MARKET

The market potential for a marine hut-to-hut product is probably significant, judging from the increasing demand for hut stays in Alaska. The Heiltsuk hut-to-hut system would be tied to nature viewing and cultural interpretation but would likely be centred around sea kayaking and ocean canoeing. A recent survey in the US estimated 2.6 million people participated in kayaking (whitewater and kayak touring) in 1994/95 and that the participation level continues to grow.

Currently, there are almost no ocean kayaking businesses in the Mid Coast. It is understood that there is a seasonal guide out of Bella Coola, and a shuttle operator in Bella Bella who will transport kayakers to remote islands. Presently, kayakers destined for the Mid Coast must either undertake self guided tours or participate in a guided tour originating on the North Vancouver Island or a mother ship. It is estimated that there are approximately three large kayaking companies based outside the Mid Coast who come to the area for kayaking.

In total it is estimated that between self guided kayakers arriving on the Queen of Chilliwack and guided tours that currently less than 800 ocean kayaking clients come to the Mid Coast each season. However, this will likely grow as popular kayaking areas in southern BC become increasingly crowded and kayakers look for more remote experiences. A Mid Coast kayaking tour may also attract some part of the Alaska hut system market. With proper promotion, it is realistic to assume that the Heiltsuk hut-to-hut tour could capture 10 to 15 percent of the current market, which would initially represent 80 to 120 clients.

COMPETITION

There are approximately 15 businesses offering backcountry wilderness experiences featuring either huts or small lodges in BC. As well, the community of Hartley Bay is in the process of completing a lodge in Cornwall Inlet on Princess Royal Island. However, there are only four businesses in BC that have the infrastructure to support a hut-to-hut experience and none of these are focused on a marine type experience. However, the primary competition for the marine hut-to-hut type experience will come from the established hut systems in Alaska. Here the United States Forest Service and private businesses offer a wide range of locations and rustic accommodations in a marine wilderness setting.

Overall though, the Heiltsuk marine hut-to-hut associated with ocean kayaking and sea canoe will find their main competition from the established ocean kayaking ventures operating in BC. Currently there are an estimated 150 operators who actively participate in guided ocean kayaking ventures in BC. Of this number approximately 30 to 40 larger ocean kayaking companies operate in the province. The larger companies are characterized by certified guides and have operating guidelines in place and undertake active marketing campaigns.

In addition, there are five very large expeditionary ocean kayaking companies. These companies employ 10 guides or more during the summer months. Two of these five companies are based on Vancouver Island, two more are based in Washington State, and one company is based out of Vancouver. In the Mid Coast at least three of the larger ocean kayaking companies operate mothership ocean kayaking experiences and one of these has a venture that starts from Bella Bella.

In BC, kayakers and tour operators are concerned about the availability of suitable campsites due to growing numbers of kayakers. By providing secure accommodation and a dry place to stay after a day on the ocean, the Heiltsuk hut system will contribute to a safe venture that participants are more likely to enjoy.

ACCESSIBILITY AND INFRASTRUCTURE REQUIREMENTS

The marine hut system would be accessible by water and the current hut system creates a route that would represent a two to six hour paddle by ocean kayak between huts each day. Therefore, the required infrastructure is in place to support this venture. However, over time it may be necessary to add additional huts. On the Outer Beach route the addition of one or two huts would eliminate the need to camp out in specific locations and allow for the development of an alternative route around the outer islands. Along the Inland Fiord route an additional hut could provide a new base camp further up Roscoe Inlet.

REGULATORY REQUIREMENTS

The operator will be required to obtain the applicable CR tenure from BC Assets and Lands

DISCUSSION OF START-UP COSTS

The ocean kayaking adventure tourism business would need to consider several key costs during the start-up phase of the operation. The proposed adventure tourism opportunity is described as a local private business that would form a partnership with the Heiltsuk community for use of the hut system. Several of the start-up costs are discussed here but a detailed business plan would need to be undertaken by the entrepreneur or business interest before undertaking the venture.

The Huts

Since the Heiltsuk have already established a network of huts in the region, there would be minimal construction requirements for the hut system to be utilized for adventure tourism purposes. If the Heiltsuk hut system could be utilized for ocean kayaking ventures, a significant barrier for the hut-to-hut adventure tourism activities would be overcome. To construct the hut infrastructure could cost the new venture approximately $40,000 a hut, and a modest hut system of six cabins (the number need to support the two tours outlined above) could cost in excess of $240,000.

As mentioned earlier, the Heiltsuk community already owns and operates the hut system. Therefore a possible arrangement that may be considered would be to have a community based adventure tourism operator(s) rent the huts for periods of time as part of their packaged tourism experience. This would contribute significantly to the overall viability of a new venture and also generate revenues, with the community retaining the responsibility for maintenance and up keep of the hut system.

Initial Equipment Purchases

The new venture would need to consider several key capital outlays to start-up their ocean kayaking business. Some key areas of equipment purchases would include:
- Establishment of an office;
- Boats;
- Repair equipment;
- Safety equipment; and
- Cooking and support materials.

The purchase of six kayaks and other required materials such as spray skirts, paddles, bailing pumps, life jackets (need to cover range of weights), accessory cord, paddling jackets, emergency signalling kits, repair kit, dry bags, rain hats, etc just to outfit the kayak will cost a minimum of $50,000 alone.

Marketing

The new venture will need to begin marketing seven to eight months in advance of its first trip dates. In the early days of the new venture considerable effort will need to be directed towards marketing. While there are several sound approaches to establishing a client base the initial marketing expenditures will be critical. The new venture will need to overcome three market challenges, specifically:

- establishing visibility;
- reaching the target market; and
- establishing sales contacts.

A minimum of $10,000 would need to be considered in the first year to start to develop the visibility of the new venture.

Administrative Expenses

There would be a range of start-up administration costs to consider including:
- legal;
- start-up administrative supply purchase; and
- licensees and permit purchases.

DISCUSSION OF OPERATING COSTS AND REVENUES[9]

Potential Key Variable Costs

Accommodation – If the Heiltsuk huts were charged to the tourism operator at a rate similar to the United States Forest Service in Alaska, a price of approximately $50 per night per cabin would be charged for each night a cabin was rented. The summer would be the peak season for the use of the hut system for tourism purposes with rentals also likely in June and September. The main issue with the hut system will be the coordination of the various community, youth, and family uses and events with tourism activities. For this reason two scenarios are developed that look at various use constraints.

Scenario 1 – Given the alternative use of the huts for other community activities, this scenario assumes that the cabins would be available for only five trips on each of the two routes over the four month summer season. The tourism operation is able to accommodate a maximum of 60 clients in this scenario.

Scenario 2 -- In this scenario it is assumed that tourism operations could occur once a week on each route for the entire four month summer period. The tourism operation is able to accommodate 120 clients in this scenario.

Table 8.4-1
Hut System Rental For Tourism Activities

	Scenario 1 (5 trips per route)	**Scenario 2** (10 trips per route)
Inland Fiord Route (4 night rental on 4 day trip)	20 days	40 days
Outer Island Route (4 night rental on 6 or 7 day trip)	20 days	40 days
Total Rental Days:	40 days	80 days
Rental Rate ($50 per cabin per night)	$50	$50
Total Cost for Cabin Rentals	**$2,000**	**$4,000**

Staffing –It is estimated that the new ocean kayaking venture would need a minimum of one certified guide and one assistant guide. While the industry standards for wage levels for guides and assistant guides are not that high, staffing arrangements for accommodation and meals are often arranged. As well, the employer will also need to make WCB, CPP, UIC and other related payments on behalf of the staff. Scenario 1 would require approximately 22 weeks of staff employment or based on two employees for 11 weeks, while Scenario 2 would require approximately 42 weeks. Therefore wages and benefits would likely range from $27,000 to $50,000.

---

[9] While this section discusses the costs and revenues associated with the venture it does not prove the viability of the opportunity. This can only be done by undertaking a detailed business plan. Only some of the preliminary costs and revenues are discussed here.

Food and Supplies – Guests would anticipate good quality food and supplies. Based on expenditures of $30 per guest per day as a ballpark figure and without designing a menu, food and supplies would be estimated at between $10,000 and $20,000 per season.

Insurance and Permits -- Operating and liability insurance is likely to be in the range of $2,500 to $3,500 per year. Acquiring a BCAL ocean kayaking tenure would cost at least $250.

Potential Revenues

Ocean Kayaking Revenues – The key economic activity that would be developed for the community through the hut system would be to support the diversification of the local tourism products offered locally. The main direct tourism opportunity for the Heiltsuk would be the development of an ocean kayaking venture.

The prices currently charged for guided ocean kayaking in the Mid Coast vary. Discovery Expeditions offers a seven day kayaking tour entitled Great Bear Rainforest kayaking tour. This is a tour based from the mothership MV Blue Fiord. This tour begins and ends in Bella Bella and the seven day trip is priced at $2,750 CAN.[10] Other mothership trips in the Mid Coast range in length from five days to nine days and are priced from $1,300 CAN to $2,500 CAN.

If the hut-to-hut experience can offer the service and quality of the mothership experience it is likely they will be able to charge similar prices. However, using a conservative pricing scheme below the current pricing of the mothership ocean kayaking tours and considering scenarios 1 to 2 for the number of trips that could be scheduled the following table outlines some potential gross revenues.

Table 8.4-2
Ocean Kayaking Hut System Tourism Gross Revenue

	Scenario 1 (5 trips per route)		**Scenario 2** (10 trips per route)	
Outer Island (6 or 7 day kayak trip charged at $1,500 CAN per person)	30 clients	$45,000	60 clients	$90,000
Inland Fiord Route (4 or 5 day trip charged at $1,000 CAN per person)	30 clients	$30,000	60 clients	$60,000
Total:	**60 clients**	**$75,000**	**120 clients**	**$150,000**

RECOMMENDATIONS

---

[10] Source: www.orcasekayaking.com/kermode_index.htm

The results of the preliminary investigation of the hut-to-hut ocean kayaking touring activity around Bella Bella suggest that there is merit in further exploring the Heiltsuk hut-to-hut ocean kayaking venture. However, the venture will need to undergo several key steps before it can be determined that the community is supportive of this venture and that the venture is viable. Some of the recommended tasks that need to be considered for this adventure tourism opportunity include the following.

- Determine if the Heiltsuk community supports the use of their hut system to develop a local ocean kayaking venture.
- Determine if there is enough available time to support an adventure tourism operation with the existing hut system without impacting community use of the huts.
- Identify local entrepreneurs or business operators in the community that would want to pursue the development of the specific adventure tourism product.
- Undertake a detailed business plan to outline the viability of the opportunity and secure financing if necessary.

APPENDIX A: CONTACTS AND ADVISORY COMMITTEE MEMBERS

LIST OF CONTACTS

Andrew, Andy, Nuxalk Nation, Bella Coola
Armstrong Bill, Communications, Ministry of Aboriginal Affairs
Baker, Doug, Bella Coola Valley Tourism, Bella Coola
Brown, Frank, Bella Bella
Brown, Sue, Bella Bella
Carpenter, Cyril, Bella Bella
Carpenter, Ed, Bella Bella
Carpenter, Jennifer, Heiltsuk Cultural Education Centre, Bella Bella
Case, Brent, Ocean Falls
Clellamin, Tina, Nuxalk Nation, Bella Coola
Cobould, Terry, Tweedsmuir Travel, Bella Coola
Dunsworth, Ken, Bella Coola
Elsey, Al, Bella Coola
Freeze David, Chair of Adventure Tourism, University College of the Cariboo
Gerwing, Kira, EcoTrust Canada
Grant, Cyndy, Ministry of Forests, Bella Coola
Grant, David, Bella Coola Valley Hotel
Greba, Larry, Larry D. Greba & Associates, North Vancouver
Hall, Chief Gary, Kitasoo Band Council, Klemtu
Hamilton, Keith, Bella Bella Community Development Society, Bella Bella
Harrington, Nikki, Oweekeno Band Manager, Oweekeno
Hemphill, Colleen, G'wsala, Port Hardy
Hobler, Allan, BC Parks, Bella Coola
Hograffe, Gerald, Ocean Falls
Howes, Don LUCO, Victoria
Humchitt, Harvey, Bella Bella
Humchitt, Leona, Heiltsuk Express, Bella Bella
Humchitt, Reg Moody, Heiltsuk Nation, Bella Bella
Humchitt, Tom, Heiltsuk Express, Bella Bella
Humchitt, Val, Sea Going Excursions, Bella Bella
Johnson, Chief Frank, Oweekeno Band Council, Rivers Inlet
Jorgenson, Larry, Bella Bella
Lamb-Yorski Matthew, Recreation Officer, North Coast Forest District
Loveless, Evan, Victoria
McKim, Patricia, Bella Coola
Morton, Renee, Bella Coola
Nylen, Kathy, Bella Coola
Pfortmuller, Mike, Shearwater Resort, Shearwater
Roe, Brian, The Bay Motor Hotel, Bella Coola
Scott, Iain, EcoTrust Canada
Sissons, Wayne, Bella Coola Air, Bella Coola
Slater, Christine, Tweedsmuir Travel, Bella Coola
Starr, Percy, Kitasoo Band Council, Klemtu

Stewart, Robbie, Lower Dean Fishing Lodge, Bella Coola
Stoddart, Jon, Capilano College, North Vancouver
Tallio, W.R., Nuxalk Nation, Bella Coola
Turner, Jennifer, Ministry of Forests, Bella Coola
Webber, Frank, Nuxalk Nation, Bella Coola
Wilson, Norma, Outdoor Recreation Council, Vancouver
Woodsworth, Glen, writer, Vancouver
Young, Lisa, BCAL, Williams Lake

ADVISORY COMMITTEE MEMBERS

Bella Coola

Doug Baker, Bella Coola Valley Tourism
Vicky Bossee
Tina Clellamin, Nuxalk Nation
Cyndy Grant, Tenures Forester, Ministry of Forests
David Grant, Manager and Owner, Bella Coola Valley Hotel
Alan Hoblen, MELP
Pentti Leppanen, Land Officer, BCAL
Rene Morton, Bella Coola Museum
Kathy Nylen, Chair Tourism Sub-committee, Economic Development Commission
Karl Osmers, Cariboo Chilcotin Coast Tourism Association
Dewayne Pederson
Brian Roe, Manager, Bay Motor Hotel
Jutta Senkowski, CTA Marketing Director, G.M. Tweedsmuir Lodge
Christine Slater, Manager, Tweedsmuir Travel
W. R. Tallio, Administrator, Nuxalk Nation
Jennifer Turner, Planning Forester, Ministry of Forests
Frank Webber, Nuxalk Nation

Bella Bella

Carmen Beggs, Councillor, BC Ferries
Kathy Brown
Edward A. Carpenter, B&B operator
Cyril Carpenter, boat charter, former fisherman
Jennifer Carpenter, Heiltsuk Cultural Education Centre
Val Humchitt, council member and tourism operator
Leona Humchitt, Heiltsuk Express
Tommy Humchitt, Heiltsuk Express
Reg. C. Moody Humchitt, Economic Dev. Officer, B.C. Development Society
Wilfred Humchitt, Band Manager
Keith Hamilton, Bella Bella Community Development Society
Connie Newman

APPENDIX B: BIBLIOGRAPHY

Anderson Publishing (1997). ***Northwest Boat Travel, May 1997 to April 1998 Volume 20.***

ARA Consulting Group Inc. and PriceWaterhouse (1996). ***Towards A Tourism Growth Management Strategy - Tourism Industry Product Overview.*** Prepared for Council of Tourism Associates of British Columbia.

BC Ministry of Advanced Education, Training & Technology and the Centre for Curriculum, Transfer and Technology (1999). ***BC Provincial Adventure Tourism programs Framework.***

BC Ministry of Forests (1991). ***Outdoor Recreation Survey 1989/90 – How British Columbians Use and Value Their Public Forest Lands for Recreation.***

BC Statistics (1999). ***Community Facts.***

Bella Coola Local Resource Use Plan Committee (1996). ***Local Resource Use Plan.***

Canadian Tourism Commission (May 1999), ***A Road Map to Tourism Financing.***

Canadian Tourism Commission (2000) ***Demand for Aboriginal Culture Products in Key European Markets.***

Canadian Tourism Commission (May 1998), ***American Travel to Canada – The Market to 2010.***

Centre for Curriculum, Transfer and Technology (1999), ***Recommendations Leading Toward A BC Provincial Adventure Tourism Programs – Framework.*** Prepared for the BC Ministry of Advanced Education, Training and Technology

Cloutier, Ross University College of the Cariboo (1998). ***The Business of Adventure.***

Clover Point Cartographics Ltd, Geoscape Environmental Planners, Marlyn Chisholm & Associates, and Sunderman and Associates (March 2000). ***Forest and Fisheries Tourism Opportunities Study for the North Coast Forest District.***

Coopers and Lybrand Consulting (1995). ***Economic Benefits of British Columbia Parks.*** Prepared for Ministry of Environment Lands and Parks.

Coull, Cheryl (1996). ***A Traveller's Guide to Aboriginal B.C.***

Geoscape Environmental Planners (September 1999). ***Vancouver Forest Region Recreation Strategy and Analysis Report.*** Prepared for the Ministry of Forests, Vancouver Forest Region.

Graydon, Don (Ed.) (1992). ***Mountaineering: The Freedom of the Hills 5th Edition.***

HLA Consultants and The ARA Consulting Group Inc. (1995). ***Ecotourism-Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment.*** Prepared for Canadian Heritage, Industry Canada, BC Ministry of Small Business, Tourism, and Culture, Alberta Economic Development and Tourism, and Outdoor Recreation Council of BC.

KPMG Managment Consulting (April 1995), ***Developing Business Opportunities Through Partnering. Prepared for Industry Canada.***

Marketrend Research Inc. (1991). ***Resident Travel in British Columbia.*** Prepared for Ministry of Development, Trade and Tourism (now Small Business, Tourism and Culture).

McAllister, Ian and Karen McAllister (1997). ***The Great Bear Rainforest: Canadas Forgotten Coast.***

McGee, Peter (1998). ***Kayak Routes of the Pacific Northwest Coast.***

McKim, Patricia (2000). ***Central Coast Land and Coastal Land and Resource Management Plan – Northern Plan Area Economic Opportunity and Barriers Study.***

Ministry of Forests and Ministry of Tourism and Ministry Responsible for Culture (June 1993). ***Alexander Mackenzie Heritage Trail Management Plan.***

Rasmussen, Greg (1997). ***Kayaking in Paradise: Touring from Alaska through the Inside Passage.***

Roger Reid, Michael Stone, and Took Whiteley (1995). ***Economic Value of Wilderness Protection and Recreation in British Columbia.*** Prepared for BC Ministry of Forests, Canadian Forest Service, and BC Ministry of Environment, Lands and Parks.

Round River Conservation Studies. ***A Conservation Area Design for the Central Coast Region of British Columbia, Canada.*** A report prepared for the Sierra Club of British Columbia, Greenpeace the Forest Action Network and the Raincoast Conservation Society.

The DPA Group Inc. (1989), ***Guide Outfitters of British Columbia: Opportunity Analysis,*** prepared for the BC Ministry of Tourism (now Ministry of Small Business, Tourism, and Culture).

The DPA Group Inc. and Maclaren Plansearch Corp. (1988). ***Fishing Lodges and Resorts in British Columbia Marketing and Development Initiatives.*** Prepared for the BC Ministry of Tourism and Provincial Secretary.

The DPA Group Inc., Data Decisions Group. Inc. (1990). ***Small Ship Cruising in BC: Market Demand and Product Assessment*** Prepared for ISTC Canada, BC Ministry of Tourism, BC Ministry of Regional and Economic Development.

The Economic Planning Group (1998). ***Prince George Region Tourism Development Opportunity Analysis.*** Prepared for the Prince George Development Corporation.

The Economic Planning Group of Canada (July 1997). ***Nova Scotia Nature Tourism Study.*** Prepared for Nova Scotia Ministry of Economic Development and Tourism.

The Economic Planning Group of Canada (March 1999), ***On the Path to Success – Lessons from Canadian Adventure Tourism and Ecotourism Operators.*** Prepared for Canadian Tourism Commission.

The Outdoor Recreation Council of BC (1988). ***Adventure Travel in British Columbia – March 1988 – Volume One.*** Prepared for BC Ministry of Economic Development and Regional Industrial Expansion- Canada.

The Randolph Group (1997). ***Adventure Travel and Ecotourism in Canada: Strategic Framework for Development. Technical Appendix – Product and Market Analysis***. Prepared for the Canadian Tourism Commission.

The Tourism Research Group, BC Research, and Campbell, Goodell and Associates (1990). ***Visitor '89: A Travel Survey of Visitors to British Columbia***, prepared for Industry Science and Technology Canada, BC Ministry of Tourism, Ministry of Regional and Economic Development.

Tourism British Columbia (1997). ***Market Origin Report: Visitors to BC from Regional Canada, BC Visitor Study***.

Tourism British Columbia (1997). ***Market Origin Report: Visitors to BC from Regional US, BC Visitor Study***.

Tourism British Columbia (1997). ***Market Origin Report: Visitors to BC from Long Haul US, BC Visitor Study.***

Tourism British Columbia (1997). ***Market Origin Report: Visitors to BC from Asia/Pacific, BC Visitor Study***.

Tourism British Columbia (1997). ***Market Origin Report: Visitors to BC from Long Haul*** *Canada*, ***BC Visitor Study***.

Tourism British Columbia (1997). ***Market Origin Report: Visitors to BC from Europe, BC Visitor Study.***

Tourism British Columbia (2001). ***Cariboo Chilcotin Coast Travel Guide 2001.***.

Tourism Canada (1995). **Adventure Travel in Canada: An Overview of Product, Market and Business Potential.**

Vassilipoulos, P. (1996) **Docks and Destinations.**

Vassilipoulos, P. (1998) **Anchorages and Marine Parks.**

Whittemore, Scott (1993) **The Bella Coola Valley and Vicinity Hiking Trails and Routes**

Wight, Pam & Associates (1999). **Catalogue of Exemplary Practices in Adventure Travel and Ecotourism.** Prepared for the Canadian Tourism Commission.

Wight, Pam & Associates (March 1999). **Market Analysis for Gwaii Haanas National Park Reserve/Haida Heritage Site.** Prepared for the Archipelago Management Board.

Woodsworth, Glenn (1997) **Hotsprings of Western Canada 2nd Ed.**

GOVERNMENT AGENCIES, CONTACTS AND PROGRAMS

AGENCY AND CONTACT	PROGRAM	PROGRAM DESCRIPTION
Human Resources Development Canada XXXXX – Tel:	**Local Labour Market Partnerships Program**- Canadian Jobs Fund Various employment assistance programs	▪ Assists communities to develop economic strategies to stimulate business development and create employment ▪ Assistance to unemployed workers to obtain skills upgrading, wage subsidy and job search assistance.
Ministry of Community Development, Cooperatives and Volunteers, Tel: (250) 746-9388, or 1-800-665-6597 website: www.cdcv.gov.bc.ca	**Community Enterprise Program**	▪ Community and Cooperative Business Development: Provides matching contributions up to $100,000 per project to community based agencies to help establish economic enterprises and create jobs. ▪ Community Capacity Building: Provides contributions up to $50,000 for projects supported by the volunteer sector, where work is generated providing a sustainable income to individuals in marginalized groups. ▪ Community Venture Capital Development: Encourages investment in small businesses through Community Venture Capital Corporations
Ministry of Small Business Tourism and Culture and Human Resource Development Canada Tel: 1-800-667-2272	**Business Information Centre**	▪ The centre located in Vancouver provides business information, consumer contacts, business education material and commercial intelligence files. The centre also has an extensive business library.
Ministry of Small Business, Tourism and Culture Tel: (250) 953-4595	**Equity Capital Programs** **Venture Capital Corporations**	▪ Investors are offered a tax incentive equal to 30% of their investment in a specific holding company called a Venture Capital Corporation (VCC). The Venture Capital Corporation in turn invests in certain types of eligible businesses.

Continued		
Ministry of Small Business, Tourism and Culture Business Equity Branch Tel: 1-800-665-6597 Web site: www.beb.sb.gov.bc.ca	**Employee Share Ownership Program (ESOP)**	▪ ESOP is a program to encourage employees to make equity investment in their own companies. Government provides 20 percent tax credit up to $2,000 per year to each employee who invests in a registered plan.
Business Development Bank of Canada Tel: (250) 851-4902 Website: www.bdc.ca	Various forms of assistance	• Loans and loan guarantees. • Venture capital and export receivable financing. • Counseling and training. • Business consulting services associated with ISO certification.
Ministry of Skills, Training & Labour Tel: (250) 717-2055 Human Resource Development Canada Tel: (250) 762-3018	Industrial Adjustment Service	▪ A federal/provincial jointly administered initiative that brings employers and workers together in a committee structure to deal with changes in the workplace. The focus is on re-employment of affected workers.. In a "community adjustment" scenario, the adjustment committee is made up of citizens and community groups interested in developing adjustment strategies.
Job Protection Commission Tel: (604) 775-0168, or 1-800-665-4605	Job Protection Services	Three basic forms of assistance are provided. ▪ In certain industries, the Commission can put in place voluntary concessions (ie: taxes ,royalties, fees, prices) to help with recovery plans ▪ The commission can act as a mediator between the firm and its stakeholders during short-term difficulties. ▪ The Commission can also pay for professional help to address specific businesses issues.
BC Hydro Website: www.bchydro.bc.ca/sites/busines	**Business CARE Program** **Industrial Real Estate** Website	▪ The Business Community Assisted Retention and Expansion Program is a locally led business retention and expansion program that helps communities understand the issues and opportunities facing their businesses. BC Hydro provides technical assistance. ▪ Provides a collective site for BC communities to feature industrial land for sale.

Western Economic
Diversification Canada

FREE E-COMMERCE TOOLS FOR SMALL BUSINESS

INTRODUCTION

Western Diversificiation
http://www.wd.gc.ca

eGovLinks
http://www.egovlinks.com

BusinessGateway
http://www.businessgateway.ca

INTERNET ACCESS

Address.Com
http://www.address.com/

DotNow
http://www.dotnow.com

Funcow
http://www.funcow.com/

NetZero
http://www.netzero.com/

3Web
http://www.3web.net/

Winfire
http://www.winfire.com/

BROWSERS

Internet Explorer Intern.
http://www.microsoft.com/windows/le/intl/default.ASP

Netscape International
http://home.netscape.com/intl/download/index.html

E-MAIL

Hotmail
http://www.hotmail.com

Email Addresses
http://www.emailaddreses.com

Free E-Mail Guide
http://fepg.net/

UTILITIES

Adobe Acrobat Reader
http://www.adobe.com/products/acrobat/readstep.html
Portable document file (PDF) viewer.

RealPlayer
http://www.real.com/
Audio and video player.

GLOBAL SEARCH TOOLS

Beaucoup
http://www.beaucoup.com

Orientation
http://www.orientation.com

Copernic
http://www.copernic.com/

Spy On It
http://www.spyonit.com/Home

Dogpile
http://www.dogpile.com

Open Directory Project
http://dmoz.org/

Dot Com Directory
http://www.dotcom.com

Infospace Yellow Pages
http://www.infospace.com/info/index_ylw.htm?

Media Links
http://www.mediainfo.com/emedia/

NewsTracker
http://nt.excite.com/

TRADE PORTALS

Interactive Export Planner
http://www.interactiveplan.com/exporter/Eng/app_templates/home_en.cfm

Export Source
http://www.exportsource.gc.ca/

FITA
http://www.fita.org/

Global Business Web
http://www.globalbusinessweb.com/

MSU-CIBER
http://ciber.bus.msu.edu/busres.htm

U of Kansas IBRC
http://www.ibrc.bschool.ukans.edu/

TradePort
http://www.tradeport.org/ts/

Worldwise
http://www.idiominc.com/worldwise/index.asp

GLOBAL E-BUSINESS LIBRARIES

Marketing Internationally
http://www.wilsonweb.com/webmarket/global.htm

Country Commercial Guides
http://www.state.gov/www/about_state/business/com_guides/index.html

Passport
http://www.doingbusinessin.com/

International Tax
http://www.taxsites.com/international.html

Market Research
http://strategis.ic.gc.ca/sc_mrkti/ibinddc/engdoc/1a1.html

FedStats
http://www.fedstats.gov/

Trade Data Online
http://strategis.ic.gc.ca/sc_mrkti/tdst/engdoc/tr_homep.html

International Bid Opportunities
http://www.fedmarket.com/sales_resources/jumpstation/bids/international.html

GOV'T TRADE HUBS

Austrade Online
http://www.austrade.gov.au/

InfoExport
http://www.infoexport.gc.ca/

New Zealand Trade Development Board
http://www.tradenz.govt.nz/

Trade Partners UK
http://www.tradepartners.gov.uk/

International Trade Administration
http://www.ita.doc.gov/

USA Trade
http://www.usatrade.gov/

TRADE TRAINING

Forum for International Trade Training
http://www.fitt.ca/

Virtual International Business Academy
http://www.viba.msu.edu/

TradeExpert
http://www.tradeport.org/ts/trade_expert/index.html

Take a World View
http://www.strategis.ic.gc.ca/SSG/sc01071e.html

Virtual Trade Mission
http://www.virtualtrademission.org/

TRADE WEBCASTS

GlobalSpeak
http://www.globalspeak.com/

ProNetLink
http://www.pronetlink.com

RealGuide
http://www.realguide.com

TRADE SHOWS

TSCentral
http://www.tscentral.com

Webcast Center
http://www.tscentral.com/webcastcenter/

Sky and Fleet E-Com Tips

Key e-commerce trends:

- **E-commerce is going into orbit.** Total e-com revenues in 1999: $300 billion. Expected by 2004: $7.3 trillion.
- **International e-business is exploding.** Share of global e-commerce business outside North America in 1999: 25%. Expected by 2002: 45%.
- **The Web is going multilingual in a huge way.** In 1999, 46% of web users non-English. By 2005, nearly two-thirds will be non-English. China will have largest number of Internet users in the world.
- **Trade barriers are collapsing all over the world.** Initiatives include WTO Millennium Round, FTAA, Euro, EC Expansion. Rio Declaration, APEC trade agreement. In 1990s, some 40 free trade areas or customs unions were established around the world, and more on the way.
- **When you go online, you are instantly global** and multinational by default, whether you thought you were or not.
- **All this means you'll have to deal with multiple currencies**, languages and business practices, or risk turning off a growing segment of the Internet market.
- **New web devices and appliances.**

- **Wireless technologies.**
- **Virtual ubiquity.**

OFFICE SUITE

StarOffice
http://www.sun.com/staroffice/

FreeDesk
http://www.freedesk.com/

Thinkfree
http://www.thinkfree.com

VIRTUAL OFFICE

CommunityZero
http://www.communityzero.com

Intranets
http://www.intranets.com

Magical Desk
http://www.magicaldesk.com

MyEvents
http://www.myevents.com

Visto
http://www.visto.com

Vjungle
http://www.vjungle.com

E-TELEPHONE

DialPad
http://www.dialpad.com/

Hot Telephone
http://www.hottelephone.com/

iConnectHere
http://www.deltathree.com

MediaRing
http://www.mediaring.com/

PhoneFree
http://www.phonefree.com

Visitalk
http://www.visitalk.com

ZeroPlus
http://www.zeroplus.com/

BOOKKEEPING

Freeworks
http://www.freeworks.com
NetLedger
http://www.netledger.com
Web-based accounting.

EMPLOYMENT

The Riley Guide
http://www.rileyguide.com

Monster
http://www.monster.com

NEWSLETTERS

egroups
http://www.egroups.com

ListBot
http://www.listbot.com

Topica
http://www.topica.com/

TRANSLATION

Babel Fish
http://babelfish.altavista.com/

Free Translation
http://www.freetranslation.com/

SystranLinks
http://w4.systranlinks.com/config

E-LEARNING

Blackboard
http://www.blackboard.com/

WebCT
http://www.webct.com/

FreeSkills
http://www.freeskills.com/

PC Show and Tell
http://www.pcshowandtell.com/

Microsoft Insider
http://www.microsoft.com/insider/learning/default.htm

Free University
http://www.vtu.edu/

World Wide Learn
http://www.worldwidelearn.com

WIRELESS

Oracle Mobile
http://www.oraclemobile.com

Web2Mobile
http://www.web2mobile.com

E-MARKETPLACES

Exostar (aerospace)
http://www.exostar.com/

Buzzsaw (construction)
http://www.buzzsaw.com/

E-Steel (steel)
http://www.esteel.com

Gofish (seafood)
http://www.gofish.com

PlasticsNet (plastics)
http://www.plasticsnet.com

Produceworld (produce)
http://www.produceworld.com
Produce.

eLance (prof. services)
http://www.elance.com

Akropolis (architecture)
http://www.akropolis.net/

ECeurope (Western Europe)
http://www.eceurope.com/

Kasna (Eastern Europe)
http://www.kasna.com

Trade2Gain (India)
http://www.trade2gain.com/

MeetWorldTrade (Asia)
http://www.meetchina.com

E-Marketplace Directories

B2businessNet
http://www.b2business.net

Line56
http://www.line56.com

FREE BROCHURE STOREFRONTS

Bizland
http://www.bizland

Freeservers
http://www.freeservers.com

Homestead
http://www.homestead.com

Moonfruit
http://www.moonfruit.com

Tripod
http://www.tripod.com

FREE E-COMMERCE STOREFRONTS

Bigstep
http://www.bigstep.com

Freemerchant
http://www.freemerchant.com

GoLinQ
http://www.golinq.com

JustWebit
http://www.justwebit.com

LookSmart Shops
http://shops.looksmart.com

VStore
http://www.vstore.com/